


CAPITAL REGION INTERMUNICIPAL TRANSIT NETWORK PLAN

Appendix 3
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EXECUTIVE SUMMARY

This Capital Region Intermunicipal Transit Network Plan has been developed through an intensive process involving many individuals committed to serving in the very best interests of the municipalities they represent, and in the broader interests of the Capital Region. The development of the Transit Plan has benefited from an extraordinary level of commitment from all who participated in its development. Moreover, the Plan and the process through which it was developed, demonstrated a remarkable level of goodwill, collaboration, cooperation and consensus between its authors. The resulting Transit Plan for the Capital Region will help link citizens of the Region in a manner that will enable them to reach their goals and aspirations with the help of a public transit system that is efficient, convenient and seamless.

The Capital Region Board (CRB), a corporation consisting of twenty-five participating municipalities, was established by the Government of Alberta in April 2008 to develop and implement a Growth Plan including a public transit network for the Capital Region. The CRB created the Public Transit Committee with a mandate to develop an Intermunicipal Transit Network Plan by March 31, 2009. This Plan fulfills that requirement by presenting an Intermunicipal Transit Network Plan for the Capital Region. It is one of four component plans (Land Use, Transit, GIS and Housing) developed by the Capital Region Board in response to the Capital Region Board Regulation. All four Plans were developed in tandem and in a coordinated fashion. None of these Plans could have evolved in the absence of the other and all of these regional Plans contemplate ongoing and even stronger linkages in the future, under the Capital Region Board.

The Public Transit Committee, comprised of ten elected officials from the Capital Region municipalities, defined its mandate as follows:

- To prepare a portion of the Capital Region Growth Plan that contains the information required by the CRB Regulation to establish a Regional Transit Plan.
- To seek approval from the Capital Region Board for policy issues arising from the Regional Transit Plan.
- To present the Regional Transit Plan to the CRB for approval.
- To make modifications to the Regional Transit Plan as may be required by the Capital Region Board.

At a Visioning Workshop held at the beginning of this project, the Capital Region Public Transit Committee agreed with the following vision:

"The Region's transit network enables the Capital Region to achieve its economic, social, and environmental objectives by making transit a convenient and competitive mode of transportation."

An intermunicipal transit Service Plan was developed based on land use scenarios considered during the development of the Capital Region Growth Plan. When a final land use scenario is approved, the Transit Service Plan can be revisited and adjusted accordingly. The guiding principles considered in developing the Service Plan included:

- Recognize and understand the different transit markets and invest accordingly;
- Provide LRT only in congested, densely urbanized corridors;
- Provide non-stop or limited stop intermunicipal bus service;
- Provide Park and Ride lots and transit centres at LRT terminal stations and other strategic locations;
- Provide Transit Priority Measures on provincial highways and interchanges;
- Provide Transit Priority Measures, where needed, on intermunicipal bus corridors within municipalities; and,,
- Avoid roadway investments that compete with transit.

In view of the above principles, and the potential growth in the Region, an intermunicipal transit Service Plan has been developed for the Region, highlighting requirements by municipality for several planning horizons including the short, medium and long term. The Transit Plan also identifies Park and Ride facilities to serve long distance trips from smaller municipalities to Edmonton and work sites in the suburban regions.

There is currently a wide range of transit fares within the Capital Region. This Plan notes that a unified regional transit system should also have a uniform basis for fare setting based on overall farebox recovery targets. While this Plan lists a number of options for fare systems, the decision will ultimately be made by the Capital Region Board.

The Plan reviewed existing specialized transportation services in the Capital Region and provides a future action plan. A key goal is one of integration to ensure that persons with disabilities can use public transportation intermunicipally without encountering unnecessary barriers. An accessible transit system can become the preferred choice for persons with disabilities. Other policies and procedures should include common eligibility and certification criteria, sharing of a client database by multiple service providers and municipalities, trip booking procedures and scheduling parameters with the aid of computer scheduling software, expanded and improved fleet mix, identified levels and span of service types, and regional cooperation considerations including transfer locations.

The Governance Framework for an Intermunicipal Transit Network presented in the Plan includes a permanent Regional Transit Committee (RTC) accountable to the Capital Region Board with committee representation drawn from a subset of the full CRB membership. The Regional Transit Committee would be charged with delivering a fully integrated and coherent regional transit network, including the planning, design, construction, and operation of any new intermunicipal transit services. The committee could ultimately also be responsible for ensuring the continued delivery of existing LRT and intermunicipal bus routes, although it would be expected to contract back to the existing local providers for those services. The local providers would continue to be responsible for planning and operation of their local bus services. The approach builds on the collaborative and cooperative approach used during planning activities over the past ten months.

The transition from the current transit operating framework into one more regionally coordinated for the Capital Region will need to evolve in three broad phases as follows:

- ▶ **Legislative and Regulatory Adjustments** – The Provincial government may need to specifically mandate the Capital Region Board to oversee and implement both Land Use and Transit Plans for the Capital Region.
- ▶ **Formation and Setup of a Regional Transit Committee** – The CRB will need to develop policies and procedures that specify the mandate, authority and responsibilities for the RTC, selection of RTC membership, resources available to the RTC and selection of the chairperson for the RTC.
- ▶ **Implementation of the Plan** – Once the RTC has been established, a number of key decisions will be required including the hiring of CRB support staff, preparing an initial business plan, identifying specific implementation priorities with a focus on “quick wins”, and establishing priorities for the intermunicipal transit services for the longer term.

The Plan suggests a number of initiatives and projects that the Regional Transit Committee could consider as “quick wins” including:

- ▶ Establish the new Regional Transit Committee;
- ▶ Hire a new Lead Executive and support staff;
- ▶ Develop a new cost allocation formula;
- ▶ Establish a consistent, region-wide fare system;
- ▶ Purchase new buses to serve growing regional demands;
- ▶ Plan and guide the construction of regional Park and Ride facilities;
- ▶ Establish a regional Customer Information System;
- ▶ Establish a regional brand and identity for intermunicipal services;
- ▶ Identify and acquire land needed for three known future intermunicipal transit facilities; and,
- ▶ Identify and implement, where appropriate, specific Transit Priority Measures along intermunicipal corridors.

The following short term Program, along with order of magnitude capital costs, has been developed for implementing the Capital Region Transit Plan.

| Short Term Intermunicipal Transit Capital Program | | \$ million |
|---|---|-------------|
| Expanded or New Intermunicipal Bus Services | Sherwood Park/Strathcona County - Edmonton | |
| | City of Leduc - Edmonton | |
| | Leduc County - Edmonton | |
| | Beaumont - Edmonton | |
| | Spruce Grove/Stony Plain/Parkland County - Edmonton | |
| | St. Albert - Edmonton | |
| | Fort Saskatchewan - Edmonton | |
| | | 26 |
| Light Rail Transit | NAIT LRT: Churchill Station to NAIT | 825 |
| Park and Ride | Lewis Estates: near Anthony Henday/87 Avenue | 30 |
| | St. Albert: near Anthony Henday Drive/St. Albert Trail (Northeast) | 15+ |
| | Sherwood Park: near Baseline Road | 15+ |
| | Spruce Grove/Stony Plain/Parkland County (near east side of Spruce Grove) | 3+ |
| Garage Capacity | Additional Bus Storage Space (Excludes land costs) | 17+ |
| Regional Fare Collection System | Region-wide Smart Card Fare Collection | 25 |
| Total | | 956+ |

The Capital Region Board will need to monitor the performance of the regional transit system to ensure that resources are being used efficiently and that services are being delivered effectively and equitably throughout the Capital Region. The Plan includes a number of detailed performance indicators including:

- ▶ Evaluation of regional transit system performance;
- ▶ Determination of resource needs to meet guidelines and targets;
- ▶ Indication of the need for Transit Priority Measures;
- ▶ Assessment of regional efforts to better link transit and land use planning; and,
- ▶ Identification of deficiencies or service gaps which need to be addressed in future years.

Recommendations to Other Bodies

- 1. Approval of the Capital Region Intermunicipal Transit Network Plan** – The Capital Region Board urges the Government of Alberta to endorse this Plan without reservation, to advocate on its behalf to the Federal government and to recognize its role in helping the Capital Region to achieve its economic, social, cultural and environmental goals.
- 2. Support of the Ongoing Role and Mandate of the Capital Region Board** – A governance structure and decision-making framework for the RTC has been arrived-at through collaboration and consensus between member municipalities. The Provincial government is urged to support this governance model and to enact the necessary legislative and/or regulatory changes to support the implementation of this governance model.
- 3. Implementation of “Quick Wins”** – The Capital Region Transit Plan has identified a number of quick wins; that is, transit initiatives and projects that are regionally beneficial and which can be implemented relatively quickly.
- 4. Development of an Urban Transit Section within Alberta Transportation** – A new section within Alberta Transportation should have a mandate and responsibility for developing and programming transit supportive policies, programs and initiatives on the provincial highway network within Alberta’s two major urban regions, including the Capital Region.
- 5. Development of a Capital Region Roadway Plan** – In order for growth and development to occur in an orderly, effective and productive fashion, a Land Use Plan, a Transit Plan and a Roadway Plan all need to have a common strategic direction. The Capital Region Board Regulation did not include a mandate to develop a regional roadway plan. The Provincial government is strongly urged to develop a Capital Region Roadway Plan, in consultation with the Capital Region Board, and with significant contributions from the newly created Urban Transit Section that reflects the new and emerging realities in the Capital Region and one which complements the Land Use and Transit Plans completed by the Capital Region Board.
- 6. Public Transit should be Considered in Context with Other Public Policy Issues** – The Government of Alberta has recently undertaken new policy initiatives aimed at updating its Energy Strategy and policies relating to reduction of Greenhouse Gas (GHG) emissions. The emergence of this Capital Region Transit Plan is very timely, as it strongly supports the energy and greenhouse gas emissions policies being pursued by the Provincial government. Given a more effective and heavily used regional transit system the region will consume less energy, emit fewer greenhouse gases, emit fewer pollutants and contribute to a greater state of health and well-being.

In addition, there are opportunities for the Provincial government to integrate public transit service policy and delivery with social and healthcare programs as they relate to transportation of persons with disabilities.

7. Provision of New Stable Operating and Capital Funds for a Regional Transit

System – In order to leverage the significant benefits of a truly regional transit system, it is recommended that the Provincial government consider providing stable and ongoing operating and capital funds to municipalities where demand can support local and/or intermunicipal transit service. In the same vein, the Provincial government is encouraged to explore alternative funding models in Canada and elsewhere in an effort to broaden the range of funding sources that can be made available for municipal, and in particular, regional transit service in the Capital Region. Given the significant returns received by the Federal government as a result of economic activity in the Capital Region, the Provincial government should engage in substantive dialogue with the Federal government to ensure policy alignment and that the Region's transit infrastructure needs are recognized and acted upon in federal infrastructure funding programs.

8. Preparation of a Cost Allocation Model – There is currently no mechanism for benefiting municipalities to share costs associated with the delivery of intermunicipal transit services. On December 15, 2008, the Provincial government set the expectation that the Capital Region Board will develop one or more formulas that would apply to any municipal portion of operating and capital costs for regional transit. The Province is encouraged to provide a clear understanding of the new ongoing funding arrangement, as noted under Recommendation 7, to provide a clear framework for development of regional transit cost allocation formulas.

9. Finalize Details of the "GreenTRIP" Program – The Provincial government's recently announced "GreenTRIP" funding initiatives appears to be very closely aligned with the new Capital Region Transit Plan and, in particular, its quick wins. The Capital Region Board urges the Provincial government to finalize the details of the "GreenTRIP" Program as the Capital Region is ready to respond positively to this program in a regionally beneficial and coordinated fashion.

SECTION 1

INTRODUCTION

The Capital Region Board (CRB), a corporation consisting of twenty-five participating municipalities, was established by the Government of Alberta in April 2008, to develop and implement a Growth Plan including an intermunicipal public transit network. The Public Transit Committee, established by the CRB, retained the services of ISL Engineering and Land Services and its subconsultants in August 2008 to assist in developing a Public Transit Plan for the Capital Region. In addition, a Blue Ribbon Panel of national and international experts was engaged to inform Committee decisions.

BACKGROUND

Working Together

In January 2008, the Government of Alberta released a report about the Capital Region entitled *Working Together*.

The Report addressed growth projections, core and social infrastructure needs, alternative approaches to governance and potential models for sharing in the costs of regional projects.

The Report recommended that the Province:

- ▶ Establish the first Board for the Capital Region effective January 2008.
- ▶ Provide the necessary start-up funding and operational support for the first three years of the Board's operations. This should include support for a portion of the costs of developing an Integrated Regional Plan for the Capital Region, which should be in place by January 2010.
- ▶ Adopt and legislate the governance model recommended in the report including the specific roles and functions, authority of the Board, voting model, the cost sharing approach and the dispute resolution process.
- ▶ Implement the key steps outlined in the transition section of the Report.
- ▶ Address and resolve the provincial issues identified in the report including providing a ten-year provincial roads and highways plan, resolving the issue of responsibility for ambulance services and addressing the critical issue of use of water for proposed upgraders in the Industrial Heartland.
- ▶ Given the significant returns that could be received by the Federal government as a result of economic activity in the Region, the province should engage in serious dialogue with the Federal government to ensure that this fact is addressed in future federal infrastructure funding programs.

The Working Together Report noted that there are a number of transit services throughout the Region and efforts have been made by municipalities to connect these services and facilities. However, these efforts have been hampered by the lack of a common planning framework to service municipalities and accommodate future growth. The Report identified the following gaps and issues in the Capital Region regarding intermunicipal transit, namely:

- The primary gap is the absence of an integrated regional transit plan.
- There is little coordination between land use planning and transportation infrastructure planning and development in the Capital Region. There are no planning policies in the Region that specifically guide the development of transit-oriented developments.
- Transit needs have not been incorporated into regional highway plans.

As the Region grows, it will be essential to consider how the regional road and highway network can be adapted to accommodate a Region that will have to rely more and more on effective transit service to move its citizens.

Coordinated Municipal Transit Review

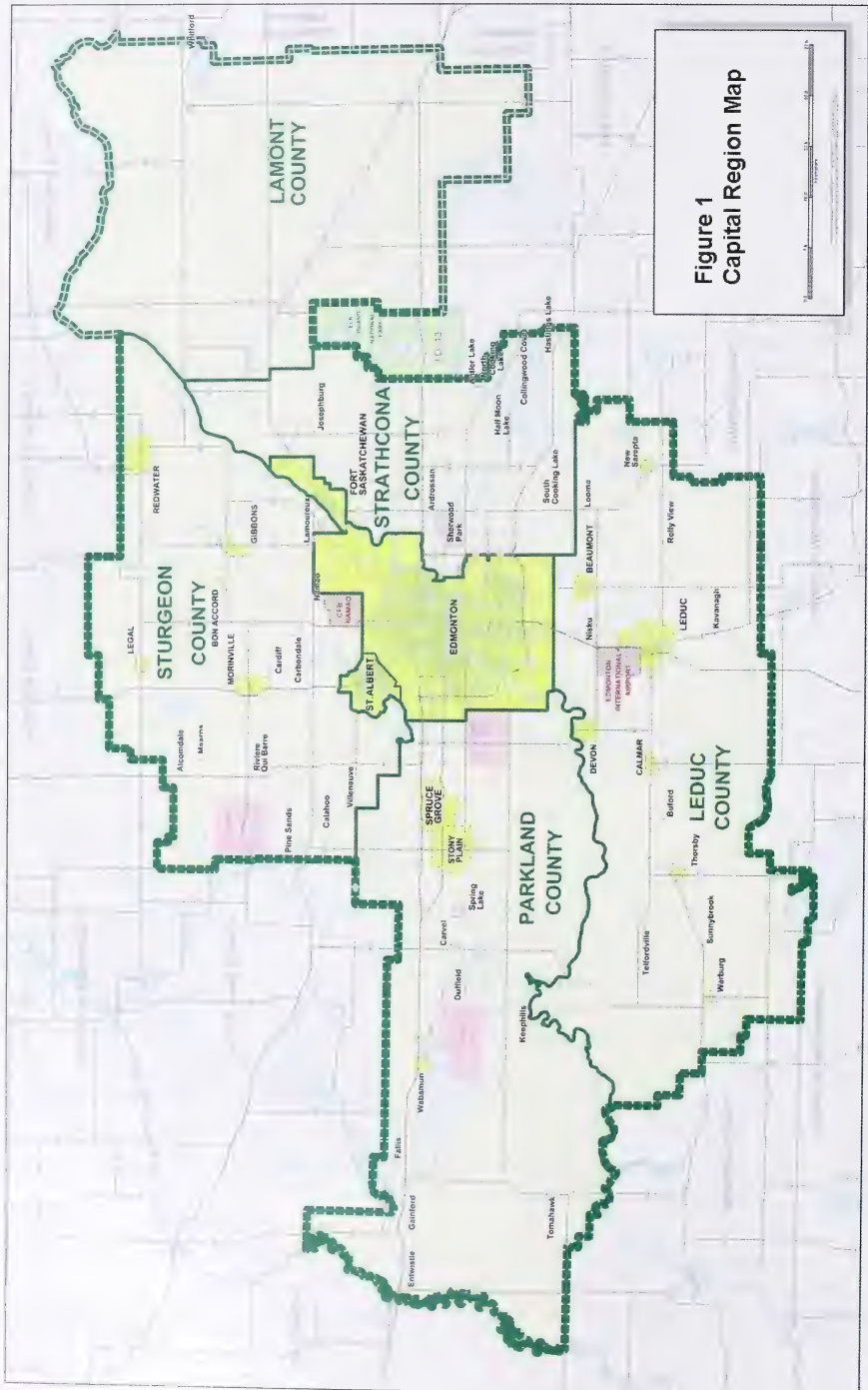
A Coordinated Municipal Transit Review was prepared for the Alberta Capital Region Alliance (ACRA) in 2002. The objectives of this Review were to:

- Examine the feasibility of transit services linking Edmonton to Spruce Grove/Stony Plain, Leduc, Nisku, the International Airport, Fort Saskatchewan/Alberta's Industrial Heartland as well as other communities in the Capital Region.
- Develop a model or tool to estimate the demand for transit rides within and between municipalities.
- Identify short term and long term transit corridors and regional transit organizational options.
- Propose a system for funding of the new transit services among municipalities, major employment centres and other stakeholders.

The major conclusions and recommendations of this Review were:

- New suburban services to some of the communities in the Edmonton commuter shed are sustainable and viable based on the norms of existing suburban services in Alberta.
- A dedicated funding source for public transit would be desirable to ensure that all areas that benefit from transit contribute and that adequate funding is available to support new starts.
- Future rail transit options for Edmonton are limited as a result of the loss of major rail corridors leading into downtown. The loss of alternative corridors and opportunities means that preservation of the remaining corridors must be given a high priority.
- The preservation or creation of transit corridors should reflect the potential growth of transit services beyond the boundaries of the city and should recognize the importance of non-radial travel.
- ACRA should assume the role of regional transit advocate to ensure that future growth in the Region is supportive of transit.

Figure 1



Capital Region Board Formation and Mandate

- Capital Region Board is a corporation consisting of the elected officials of the twenty-five municipalities in the Capital Region. The Board was established by the Capital Region Board Regulation, under the Municipal Government Act on April 15, 2008. A map of the Capital Region is shown in Figure 1.
- The Board's mandate is to prepare and submit to the Minister of Municipal Affairs a Capital Region Growth Plan by March 31, 2009. In addition to preparing the Plan, the Board is mandated to facilitate the resolution of any issues and advise and make recommendations to the Minister regarding the preparation and implementation of the Plan. The Board is further mandated to implement policies for the sharing of costs among the participating municipalities for regional projects of the Capital Region, and to carry out other functions and duties as the Minister of Municipal Affairs directs.
- The CRB Regulation requires the preparation of an Intermunicipal Transit Network Plan for the Capital Region that includes the following:
 - The decision-making process to approve the regional intermunicipal transit network;
 - Procedures for implementing the delivery of regional intermunicipal transit services;
 - Provision for specialized transit services for persons with disabilities; and,
 - Methods for reviewing and monitoring the regional Intermunicipal Transit Network Plan.

Public Transit Committee

- The Public Transit Committee (PTC) was established by the Capital Region Board to address the intermunicipal public transit network planning priority. The PTC, chaired by a member of the Capital Region Board, includes nine additional voting members who are elected officials appointed by their respective municipalities. The committee membership was as follows:
 - Nolan Crouse (St. Albert) – Committee Chair
 - Rob Wiedman (Parkland County) – Vice Chair
 - Bill Nimmo (Gibbons)
 - Ed Gibbons (Edmonton)
 - Peter Wlodarczak (Strathcona County)
 - Carrie Fischer (Redwater)
 - Mary-Ann McDonald (Leduc County)
 - Randy Palivoda (Spruce Grove)
 - Greg Krishke (Leduc)
 - Kirk Popik (Calmar)

- The stated mandate of the PTC, as approved at the inaugural meeting held on June 6, 2008 was:
 - To prepare a portion of the Capital Region Growth Plan that contains the information required by Part 2: Section 12(1)(b) of the Capital Region Board Regulation (the “Regional Transit Plan”).
 - To seek approval from the Capital Region Board for policy issues arising from the Regional Transit Plan.
 - To present the Regional Transit Plan to the Capital Region Board for approval.
 - To make such modifications to the Regional Transit Plan as may be required by the Capital Region Board.

Stakeholder Consultations and Research

- Several stakeholder consultations were held during the process. The first consultation was a Visioning Workshop held in Edmonton on September 5, 2008, as the first major step in planning a regional transit network. Workshop participants included members of the Public Transit Committee, and planning and transportation administration staff from many of the twenty-five municipalities in the Capital Region. The workshop discussion addressed the nature of regional transit in the future, and key characteristics of a regional network exploring the perspective of different user groups. These included transit riders, decision-makers, taxpayers, planners, local systems and persons with disabilities. The workshop laid the groundwork for the development of a common vision and operating principles for the Capital Region Transit Plan (see Section 3 and Appendix A).
- A second round of stakeholder consultation involved a series of interviews and workshop with selected stakeholders regarding governance. These included the mayors of the municipalities with existing public transit systems, transit managers, transportation administrators, solicitors and senior CRB administration. A total of eighteen key stakeholders were interviewed from the City of St. Albert, Strathcona County, City of Edmonton, City of Leduc, City of Spruce Grove, Leduc County and CRB staff. The information obtained from these interviews and workshops served as vital background for the preparation of the recommended Governance Framework (see Section 7 and Appendix A).

In order to aid and inform the development of an appropriate governance model for intermunicipal transit, significant research was carried out on peer cities in Canada, the United States and Australia. This research, which is summarized in tabular form in Appendix B, allowed for consideration of a variety of models and a determination of features that were deemed to be optimal for the Capital Region.

- A third component of stakeholder consultation focused on Specialized Transit Services. Two workshops were held to consider the public transit requirements for persons with disabilities (see Appendix C).

Blue Ribbon Panel

The development of this Plan was aided by contributions from a Blue Ribbon Panel of national and international transit experts who provided a variety of perspectives for the consideration by the Public Transit Committee. The Panel consisted of the following individuals:

- Mr. Al Cormier, Executive Director of Electric Mobility Canada
- Dr. Anthony Perl, Director of Urban Studies Program, Simon Fraser University
- Mr. Robert Olivier, Vice-Président Planification et Innovations, Agence Métropolitaine de Transport de Montréal
- Mr. Glen Leicester, Principal of Shirocca Consulting, North Vancouver, British Columbia

Members of the Blue Ribbon Panel provided feedback to the Public Transit Committee on two separate occasions. These contributions consisted of both written and verbal comments. The written comments submitted for committee consideration are published under separate cover as Appendix D.

OBJECTIVES

The stated objectives for this Plan were:

- To prepare the “Regional Transit Plan”, a portion of the Capital Region Growth Plan.
- To seek approval from the Capital Region Board for policy issues arising from the Regional Transit Plan.
- To present the Regional Transit Plan to the Capital Region Board for approval.
- To make such modifications to the Regional Transit Plan as may be required by the Capital Region Board.

And the key elements of the Regional Transit Plan were to include:

- A vision, corresponding policies and plans for a regional transit network that meet the objectives of the Capital Region Growth Plan and the intent of the Working Together Report.
- Definition of the governance, management and operational requirements for providing intermunicipal transit services; these services would include regional bus services, commuter services, Park and Ride facilities, LRT services and transportation services for persons with disabilities.
- Definition of a five-year transitional plan that outlines how the current state of services should be transitioned to a new region plan.
- Definition of funding requirements and policies needed to bring a regional transit plan to fruition, both in the near term and the longer run.
- Develop a series of performance measures that can be used to assess the evolution of a regional transit plan over time.

BASIS FOR AND INTENDED USES OF THE PLAN

This Intermunicipal Transit Network Plan has been developed on the basis of assumptions including potential growth projections, information from bylaws, approved and pending transportation (master) plans for member municipalities, the Capital Region's Land Use Plan, as well as discussions with stakeholders representing CRB member municipalities. The Plan is built upon key elements in these approved and pending plans and may need to be adjusted should these plans and base assumptions change in future.

The Plan is intended to provide guidance to the Capital Region for regionally integrated and coordinated transit service planning and delivery. The Plan reflects a shared commitment, responsibility and accountability for the planning and delivery of intermunicipal transit services in the Capital Region. The Plan is not intended, in its current form, to prescribe, direct or commit member municipalities to any specific actions or funding commitments.

Therefore, all maps, charts and tables that illustrate transit service routings and related facility locations should be interpreted as being conceptual and for illustrative purposes only. They are intended to show the general direction of potential future intermunicipal transit routes. The actual location and timing of such services is subject to further development with municipalities as well as approval by the Regional Transit Committee and Capital Region Board in the future.

SECTION 2

EXISTING CONDITIONS

TRANSIT SYSTEMS WITHIN THE CAPITAL REGION

Transit in the Capital Region is provided primarily by three publicly-owned operators including Edmonton Transit Systems (ETS), St. Albert Transit (StAT) and Strathcona County Transit. Some supplementary services are operated by private operators (e.g. Greyhound, SkyShuttle) or employer sponsored charters (e.g. Diversified).

Collectively, the three municipalities provide the CRB with 150 years of planning and operational experience, a comprehensive understanding of their customer base, past success in collaborative intermunicipal projects, and a fleet of 1,231 vehicles; including traditional buses, articulated buses, highway coaches, LRT cars and vehicles for specialized transit.

ETS provides service within Edmonton with a fleet of more than 850 transit buses and 37 light rail cars. ETS also provides service outside the city boundaries to Canadian Forces Garrison Edmonton, Spruce Grove and Fort Saskatchewan under various contractual arrangements.

ETS provides a rich and dense network of routes, particularly within the urban core. Service is provided seven days per week, eighteen hours per day on key routes and service is extended to new subdivisions early in their development. StAT and Strathcona Transit provide a good level of commuter service to Edmonton destinations, but lesser levels of local service, particularly nights and weekends. None of the systems attempt to serve any of the large industrial employment complexes outside the City of Edmonton, and services to light industrial parks in Edmonton and St. Albert do not generate much ridership.

StAT operates service within St. Albert and between St. Albert, downtown Edmonton, the University of Alberta and West Edmonton Mall. StAT also provides a single trip on behalf of Morinville between Morinville and St. Albert. StAT operates a fleet of forty-nine conventional and articulated suburban style buses. A major gap in service is the lack of a direct connection to Northgate Transit Centre, a major ETS Transit Centre for north central Edmonton.

Strathcona Transit provides transit service to Sherwood Park residents and service between Sherwood Park and downtown Edmonton and the University of Alberta. Strathcona Transit operates a mixed fleet of 88 buses including small buses, twelve metre buses, articulated buses and highway coaches and is now considering adding double-decker coaches to reduce operating costs and provide increased capacity. Strathcona Transit did operate a service to Millwoods Transit Centre to provide access to the industrial areas in Southeast Edmonton; however, ridership on the route was less than twenty per day, and the service was cancelled. Access to the southeast is still possible by transferring from their Whyte Avenue services at either 83 Street or 99 Street. Strathcona Transit does not serve refinery row or any of the other areas of heavy industry in the County.

In recent years, pilot services were tested between the City of Leduc and Edmonton, and the Town of Beaumont and Edmonton. Both services were cancelled after the demonstration period; however, interest remains high in Leduc and Beaumont, as well as Leduc County and discussions have been taking place in recent months about restoring some type of service.

Greyhound Lines of Canada provides service between Edmonton and a number of municipalities in the Capital Region. Services are generally only provided one or two times per day and are not scheduled or priced for commuters. Fares are also significantly higher than provided by transit operators. For example, Stony Plain to Edmonton is \$23.30 return, compared to less than \$10.00 on the service provided by the City of Spruce Grove. As of December 31, 2008, Greyhound serves the following municipalities to and from Edmonton:

- St. Albert
- Sherwood Park
- Thorsby
- Calmar
- Devon
- Wabamun
- Lamont
- Bruderheim

A scheduled bus service is also provided from Edmonton to Edmonton International Airport by SkyShuttle using ten passenger vans. Fares are \$6.00 one way for airport workers and no pass program is available. This service and discount is not available to other workers in Leduc County. Several large industrial projects under construction in the northeast quadrant of the Region provide a chartered bus service to bring workers to their construction sites. These services operate from all areas of the Region using Park and Ride or feed from local transit operators. The bus operators do not usually provide parking and often depend on underutilized shopping centre lots or similar sites for passenger parking.

CURRENT GOVERNANCE STRUCTURE

Three municipalities within the Capital Region operate full fledged public transit systems under the direction of their respective elected mayor and Council, namely the City of Edmonton, the City of St. Albert and Strathcona County.

While the three transit systems are planned and operated independently, the three municipalities coordinate the coverage of their systems and have operating agreements to allow passengers to transfer between the systems, sometimes for a fare increment. The most effective example of regional cooperation between the three municipalities is the negotiation of a Universal Transit Pass (U-Pass) revenue sharing agreement to coincide with the implementation of the U-Pass, effective September 2007. The main regional connections are to Edmonton's Downtown and the University of Alberta, from transit centres and Park and Ride lots on the Edmonton-side of both St. Albert and Sherwood Park. The services are moderately frequent and operate in mixed traffic with other traffic.

LAND USE, POPULATION, EMPLOYMENT

The Capital Region is one of the largest (by land area) metropolitan areas in Canada. It includes the full range of land uses from raw, undeveloped wilderness to farmland, to low density residential and industrial development and to high density residential and office towers. The Capital Region's vast land area of some 1.2 million hectares means that populations are relatively widely dispersed.

In 2008, the Capital Region had a population of 1,038,650 people. The Capital Region's two largest cities, City of Edmonton and the City of St. Albert, together account for 76 percent of the Region's population. The Region's other smaller cities (Leduc, Fort Saskatchewan, Spruce Grove) account for another six percent of the Regional population.

There are approximately 530,000 jobs in the Capital Region with Edmonton accounting for about 420,000 jobs. Outside of Edmonton, employment nodes exist in the Leduc, Nisku and the Edmonton International Airport areas in the south, at Acheson Industrial Park in Parkland County, in the petro-chemical industries in the western and northern sections of Strathcona County, in Fort Saskatchewan and the surrounding areas in Sturgeon County.

TRAVEL PATTERNS AND TRANSIT USE

The highly dispersed nature of the Region's population and employment base results in travel patterns that are also highly dispersed. The strong exception to this broad pattern is the central area of Edmonton which includes the downtown and the University of Alberta area. These two areas combined have very high densities of jobs and educational institutions. Consequently, the downtown and the University area are the largest and best markets for transit service both in terms of magnitude of trips as well as from a market share perspective.

Overall, transit use in the Capital Region constitutes about seven percent of total daily weekday trips. Transit accounts for about twenty-two percent of all trips to the central area of Edmonton. Transit trips to/from the Region outside Edmonton account for about eleven percent of total daily weekday trips.

SPECIALIZED TRANSPORTATION SERVICES

Mobility challenged persons have access to a variety of services for their transportation needs. Low floor buses and specially adapted Light Rail Transit System (LRT) cars allow improved accessibility, but not for all mobility challenged persons.

In addition to the conventional or general public transit services, municipalities throughout the Region provide specialized public transit services for seniors and persons with disabilities, general public Dial-a-Ride, and Taxi Scrip programs including:

- Demand Response Para/Specialized Transit: St. Albert, Edmonton, Strathcona County, and Stony Plain
 - Advanced booked, door-to-door or curb-to-curb transportation for seniors and persons with disabilities
- Taxi Scrip: Fort Saskatchewan
 - Subsidized taxi service for seniors and persons with disabilities
- Dial-a-Ride: Devon (general public), Leduc and Spruce Grove (seniors and persons with disabilities)
 - Provide both regularly scheduled and advanced booked/reservation service

Eligibility for the above noted services depends on a variety of factors dictated by each municipality. These factors include age, trip purpose and destination/origin. Fares are charged and in some cases, are consistent with fares charged for “regular” transit. There is no integration of these services between municipalities.

In addition to these municipally funded services, there exist in virtually all municipalities, a range of volunteer driven programs, not-for-profit transportation services as well as some level of program (and client) specific social service transportation. These transportation services, such as Driving Miss Daisy, provide accompaniment and a level of attendant care not typically provided to the seniors and persons with disabilities by the municipal specialized transit services.

SECTION 3

VISION AND PRINCIPLES

“The Region’s transit network enables the Capital Region to achieve its economic, social, and environmental objectives by making transit a convenient and competitive mode of transportation.”

VISION FOR CAPITAL REGION INTERMUNICIPAL TRANSIT

The Capital Region’s Public Transit Committee believes that coordinated action is required to achieve its vision. The intelligent application of proven practices and leading-edge technologies can make the Capital Region unique in the world, recognized for its innovation and success.

To be successful, regional transit must become an essential aspect of the social fabric of Capital Region municipalities and an economic driver that will help transform the Region by attracting people to live and conduct business here. In this way, the Capital Region will be recognized as a leader in transit design, efficiency and rider satisfaction.

This vision, along with supporting principles and operational values, provides guidance to the planning team in preparing a long term regional transit plan. It describes the role that transit will play in building a sustainable future for the Capital Region. It describes a future that we are striving to attain, one that conveys components of a shared vision to those creating other components of the Capital Region Plan, and one that conveys to our citizens how they can share in the creation of a prosperous, appealing and healthy community.

GUIDING PRINCIPLES

Capital Region Intermunicipal Transit must be:

For Planning:

1. Integrated with land use planning in the Region.
2. Integrated with regional roadway investments to ensure that the benefits of transit service are levered to the greatest extent possible through protection of transit corridors and provision of Transit Priority Measures within regionally significant roadway and highway corridors.

3. Easily expandable as the Region grows and travel demand evolves.
4. Recognizes complementary regional, local and private services.

For Local Transit:

5. Flexible enough to support local community needs and services within the regional network.

For Specialized Services for persons with disabilities:

6. Enables equitable, barrier-free access to mass transit for persons with disabilities.
7. Available to persons with disabilities, where warranted and practical.

For Governance:

8. Mandated by relevant legislation, administered through an appropriate regional governance structure, and characterized by cooperation and coordination.

For Cost Sharing:

9. Recognized by funders and the public as a valuable public service.
10. Supported through dedicated cost-sharing from all levels of government, industry and users.
11. Delivered fairly and equitably to citizens of the Capital Region recognizing the shared benefits of a well planned, and integrated regional transit network.

OPERATIONAL VALUES

The following operational values are extended to further inform decision-makers about the desired end state for regional transit service:

Capital Region Transit is a desirable travel choice by residents and visitors because it is:

- Seamless;
- Fast;
- Reliable, on-time, predictable ;
- Safe;
- Efficient;
- Affordable;
- Convenient;
- Easily navigated;
- Comfortable;
- Connected to other travel modes such as walking, cycling, taxis, buses, trains and vehicles that together support a healthy lifestyle; and,
- Cohesively linked across geographic areas via routings, schedules, fares, safety standards and facilities.

SECTION 4

POTENTIAL LAND USE SCENARIOS

Transit Service and Route Planning, by their nature, are based on population and employment projections and trip patterns. As such, it is closely related to land use planning. Growth projections help estimate potential demand and guide the volume, type and timing of public transit services as well as the required investments.

The Service and Route Plan for intermunicipal public transit in the Capital Region has been developed on the basis of potential growth projections considered during development of the Capital Region Growth Plan. Two potential land use scenarios, a Trend Scenario and an Alternate Scenario, were considered in development of the intermunicipal transit service and route plans. For the most part, only the timing and volume of public transit, not the routing, differs between these two scenarios.

The Service and Route Plan represents a planning blueprint. Ultimately, decisions and deployment of intermunicipal transit by the Regional Transit Committee will be driven by actual growth patterns that are anticipated after approval of the Capital Region Transit Plan.

The Trend Scenario maintains the existing land use patterns and forms reflected in locally adopted municipal statutory plans. The Alternate Scenario focuses on establishing priority development nodes along major transportation corridors and minimizing the ecological footprint by supporting smart growth, acknowledging environmentally significant areas and respecting high quality agricultural lands. The difference in population between the two scenarios is relatively small and does not have significant impact on the transit network in most cases. The proposed Service and Route Plan is based on the Alternate Scenario for the Region. Once a final population and employment projection is approved, the proposed Service and Route Plan will be revisited and adjusted, if required.

In the Alternate Scenario, transit outside Edmonton will be concentrated in the growth centres that exist today such as Fort Saskatchewan, Spruce Grove/Stony Plain, Leduc, St Albert and Strathcona County since few other areas will have concentrations of population sufficient to justify transit service. The Plan will rely on extensive use of Park and Ride for both travel into Edmonton on transit and out of Edmonton to the major employment sites on other modes of transportation. Transit will be an important component of the transportation system, but an auto oriented highway network will continue to be required to accommodate the dispersed employment in the Exurban Zone.

Transit outside Edmonton will be concentrated along existing corridors, serving existing population centres. Employment centres will still be dispersed; however, they may be easier to serve with alternatives such as limited transit service, van pools or private transit. The result is that the transit service to the residential growth centres will be more convenient, offer more frequent service, longer spans of service and serve a wider variety of destinations with better equipment and facilities than could be provided in the Trend Scenario. Ridership will be higher and the subsidy per passenger will be lower. Transit will be improved in specific corridors in order not to encourage further sprawl. There should also be a corresponding decrease in roadway investment outside the designated growth corridors where transit is being improved, except where Transit Priority Measures are used.

LAND USE PRINCIPLES AND POLICIES

The Capital Region Land Use Plan includes the following high order principles. The information below provides detail regarding principles and policies related only to transit. A comprehensive list of Land Use Principles and Policies are contained in the Capital Region Land Use Plan.

I. Protect the Environment and Resources

- A. Preserve and Protect the Environment
- B. Preserve Agricultural Lands
- C. Protect Natural Resources
- D. Minimize the Impact of Development on Regional Watersheds and Airsheds
- E. Minimize the Impact of Heavy Industrial Developments

II. Minimize Regional Footprint

- A. Identify, Protect and Prioritize Lands for Regional Infrastructure
- B. Concentrate New Growth Within Priority Growth Areas
 - The CRB shall review the Priority Growth Areas in conjunction with, or subsequent to the approval of:
 - a. Changes to the routing of LRT or regional bus service in the Capital Region Intermunicipal Transit Plan.
 - b. Creation of new or significant adjustments to major employment areas in the Plan area.
 - c. New alignments or changes to alignments and/or location of major regional infrastructure.
 - Transit corridors and nodes within the priority growth areas shall be identified. Growth within nodes and along these corridors shall be intensified. Encourage and support multi-use and multi-storey development at the nodes within the Priority Growth Areas.
 - Ensure that transit corridors and nodes are identified and developed with a range of mixed uses and densities. These uses shall be integrated with existing and potential employment centres.
 - Determine the degree of intensity for each transit corridor and node based on its location.

- C. Allow Growth Outside of Priority Growth Areas
- D. Support Expansion of Medium and Higher Density Residential Housing Forms
- E. Support Cluster Country Residential Development

III. Strengthen Communities

- A. Create Inclusive Communities
- B. Support Healthy Communities
 - Improve accessibility to community services by providing sidewalks, bicycle trails to encourage walking and cycling and locate these services within proximity to transit, where possible.
- C. Support Public Transit
 - Provide a mix of higher intensity land uses along transit corridors, at nodes, and employment centres.
 - New developments shall plan for public transit support facilities such as Park and Ride lots (where appropriate).
 - New developments shall be designed for connectivity and accessibility to transit facilities.
 - Prioritize public investments in multi-modal transport, Park and Ride lots, transit, and transit related services, in locations approved by the CRB.
- D. Support Innovative and Affordable Housing Options

IV. Increase Transportation Choice

- A. Integrate Transportation Systems with Land Use
 - Ensure the identified function and capacity of local transportation facilities is consistent with regional land use principles.
 - Ensure the integration of public transportation infrastructure and land use development.
 - Design transportation infrastructure to support multiple modes of transport.
 - Support development of inclusive communities to reduce the need for travel.
- B. Support the Expansion of Transit Service in Various Forms
 - Expand and extend the level, quality and range of public transportation options available to serve the Region.
 - Direct public infrastructure investments to the transit corridors and transportation projects that support regional growth plan policies.
 - Support expanded transit options through investment in alternative transit methods (e.g. designated transit lanes, high-occupancy vehicle (HOV) lanes, and Park and Ride facilities).
 - Support multi-modal transportation options by providing multi-use streets sufficient to accommodate bicyclists, motorists and pedestrians.
 - Support public transportation options that are environmentally friendly and safe.

V. Ensure Efficient Provision of Services

- A. Design Integrated Physical Infrastructure within the Region
 - Coordinate and align infrastructure planning between municipalities.
 - Identify and protect corridors for transportation, transit and infrastructure requirements.
 - Ensure coordination of plans with, and provide support to, organizations that provide municipal services in the Capital Region in a shared and coordinated matter.
- B. Maximize Utilization of Existing Infrastructure

VI. Support Regional Economic Development

- A. Ensure a Supply of Land To Sustain a Variety Of Economic Development Activities
- B. Attract and Retain Individuals and Families with a Diverse Range of Skills to the Capital Region to Satisfy the Region's Economic Development Goals
- C. Support Regional Prosperity
- D. Position the Capital Region Competitively on the World Stage

SCENARIO IMPLICATIONS

The Alternate Scenario increases population and employment densities in the City of Edmonton and reduces sprawl outside of Edmonton. The actual shift of population and employment in terms of the Capital Region is relatively small. The forecast reflects that employment growth in the Region is tied to the growth of industries in the Suburban and Exurban Zones, areas and jobs that are not easily served by conventional public transit. Population growth in Edmonton will encourage greater use of transit within Edmonton as well as create new demand for reverse commuter travel from Edmonton to suburban and exurban jobs.

While St. Albert and Sherwood Park have a complete local transit service, Stony Plain and Spruce Grove do not yet have a local service network, but are expressing strong interest in providing such a service to improve the quality of life, and provide more mobility for residents, including seniors, students and workers. Jobs within the Acheson Industrial area, while closer to Edmonton, may be more difficult to serve with transit than jobs in Spruce Grove or Stony Plain. Forecasted population and employment at the Edmonton south boundary, the City and County of Leduc, as well as, the Edmonton International Airport are potentially within reach of some type of transit services.

The Alternate Scenario concentrates employment along the transit corridors that link Edmonton to major exurban population centres. Supportive land use regulations and future industrial projects in the exurban area are required to enable public transit options. This means that plants must be built to directly front on public highways, sidewalks and other infrastructure must be provided and clustering of development encouraged. Without an aggressive change to current development patterns non-conventional options such as van pools and employer provided buses to transit nodes on the fringes of Edmonton will be the only viable options for mass transit in the exurban industrial area.

Figure 2 compares the 2043 Trend Scenario population projections by municipality with the Alternate Scenario. Figure 3 compares the 2043 Trend employment forecast with the Alternate Scenario. A change of 3,000 or more residents or a change of 1,000 jobs is taken as the threshold for having a potential impact on transit. This is based on a modal assumption of ten percent for transit for jobs in the exurban or suburban areas (100 transit riders) being sufficient to warrant about three trips per peak period.

The Alternate Scenario does not specify whether businesses opening in the Suburban and Exurban Zones will be faced with land use regulations that require a transit-friendly environment. This includes street patterns that provide for efficient routing of vehicles (e.g. no cul-de-sacs and favourable orientation of loop roads), provision of pedestrian infrastructure including sidewalks, shelters and benches, and street oriented building siting (entrance to buildings at the street, parking behind, away from the street). If it is not possible or desirable to bring industries and jobs closer to where people live it will be necessary to make the environment friendlier to transit if there is to be any chance of increasing the transit modal share.

The 2003 analysis for ACRA suggested that the minimum population required to initiate a commuter transit service was about 15,000. Since that time services were begun in Spruce Grove (population 19,000), Fort Saskatchewan (17,000), Morinville (7,200), Beaumont (10,000) and Leduc (20,000). Spruce Grove and Fort Saskatchewan have proven to be successful while the Beaumont and Leduc services were cancelled due to high costs and/or low ridership. The threshold of 15,000 also represents an estimate of the minimum population required to support any type of local service; however, little or no experience has been gained in recent years to judge the accuracy of this assumption. The commuter service results, though, appear to indicate that the 15,000 threshold remains valid. Even though other factors such as the demographics, work location and the potential for two way flow may move the threshold higher or lower. Services have been introduced at lower thresholds with mixed results.

There are municipalities with populations below the 15,000 threshold, where transit service could be considered in light of demand, as well as proximity to employment nodes. Initially, these municipalities could be served by lifeline services consisting of peak hour service only.

Figure 2 shows population forecasts for the Alternate Scenario. A number of cities and towns are expected to meet or exceed the threshold to warrant transit service. Three of five counties also meet or exceed the threshold. Strathcona County, which includes Sherwood Park, the Edmonton Garrison in Sturgeon County and some potential population growth adjacent to Edmonton, in Leduc County, are areas suitable for transit service.

Figure 2: Alternate Scenario Population Forecast

| Municipality | Alternate Scenario Population | | | | | Change 2008- 2043 |
|------------------------|-------------------------------|-----------|-----------|-----------|-----------|-------------------------|
| | 2008 | 2013 | 2018 | 2028 | 2043 | |
| Alexander First Nation | 976 | 1,033 | 1,126 | 1,257 | 1,405 | 428 |
| Bon Accord | 1,603 | 1,781 | 2,039 | 2,452 | 2,950 | 1,347 |
| Gibbons | 2,906 | 3,729 | 4,696 | 5,945 | 7,348 | 4,442 |
| Legal | 1,252 | 1,357 | 1,516 | 1,735 | 1,938 | 687 |
| Morinville | 7,228 | 7,930 | 8,192 | 8,555 | 9,801 | 2,573 |
| Redwater | 2,302 | 3,057 | 3,927 | 5,020 | 6,235 | 3,934 |
| St. Albert | 58,501 | 64,996 | 72,606 | 85,191 | 99,998 | 41,497 |
| Sturgeon County | 19,204 | 19,810 | 21,135 | 23,219 | 25,608 | 6,404 |
| Bruderheim | 1,385 | 1,585 | 1,867 | 2,313 | 2,783 | 1,397 |
| Fort Saskatchewan | 17,243 | 22,162 | 25,591 | 33,826 | 41,913 | 24,670 |
| Lamont County | 3,937 | 3,966 | 4,170 | 4,492 | 4,661 | 724 |
| Strathcona County | 84,415 | 91,787 | 99,769 | 107,392 | 112,891 | 28,476 |
| Town of Lamont | 1,689 | 1,743 | 1,853 | 1,970 | 2,094 | 405 |
| Beaumont | 10,820 | 11,921 | 13,011 | 15,043 | 17,752 | 6,932 |
| Calmar | 2,004 | 2,177 | 2,349 | 2,565 | 2,788 | 784 |
| Devon | 6,400 | 7,110 | 7,639 | 8,538 | 9,777 | 3,377 |
| Leduc City | 20,529 | 25,330 | 31,211 | 37,963 | 43,795 | 23,266 |
| Leduc County | 12,985 | 17,302 | 22,125 | 27,753 | 33,110 | 20,126 |
| New Sarepta | 417 | 441 | 481 | 537 | 600 | 183 |
| Thorsby | 964 | 1,045 | 1,167 | 1,336 | 1,493 | 529 |
| Warburg | 632 | 669 | 729 | 794 | 887 | 255 |
| Enoch | 1,521 | 1,649 | 1,842 | 2,109 | 2,355 | 835 |
| Parkland County | 29,850 | 30,861 | 31,150 | 31,887 | 32,231 | 2,381 |
| Spruce Grove | 22,380 | 24,565 | 26,776 | 30,904 | 36,191 | 13,811 |
| Stony Plain | 14,310 | 15,399 | 17,199 | 19,887 | 24,125 | 9,815 |
| Wabamun | 610 | 629 | 669 | 712 | 756 | 146 |
| Wabamun IR | 1,300 | 1,409 | 1,574 | 1,802 | 2,013 | 713 |
| Region Total | 327,363 | 365,442 | 406,410 | 465,197 | 527,500 | 200,137 |
| Edmonton Total | 766,742 | 822,858 | 899,183 | 1,033,125 | 1,181,279 | 414,537 |
| Edmonton CMA | 1,094,105 | 1,188,300 | 1,305,593 | 1,498,322 | 1,708,779 | 614,674 |

Figure 3 shows the employment forecast for the Alternate Scenario. St. Albert, City of Leduc and Fort Saskatchewan are expected to have significant employment growth, with more than 10,000 new jobs by 2043. Conversely, municipalities in the Exurban Zone (Sturgeon County, Leduc County, Parkland County, Spruce Grove, Stony Plain) are expected to be widely dispersed and difficult to serve with conventional transit.

Figure 3: Alternate Scenario Employment Forecast

| Municipality | Alternate Scenario Employment | | | | | Change 2008- 2043 |
|------------------------|-------------------------------|---------|---------|---------|---------|-------------------------|
| | 2008 | 2013 | 2018 | 2028 | 2043 | |
| Alexander First Nation | 232 | 247 | 269 | 307 | 329 | 97 |
| Bon Accord | 236 | 264 | 301 | 370 | 424 | 188 |
| Gibbons | 654 | 768 | 894 | 1,098 | 1,257 | 603 |
| Legal | 434 | 459 | 506 | 592 | 636 | 202 |
| Morinville | 2,095 | 2,310 | 2,519 | 3,007 | 3,480 | 1,385 |
| Redwater | 1,065 | 1,132 | 1,227 | 1,360 | 1,557 | 492 |
| St. Albert | 16,935 | 17,554 | 18,336 | 20,699 | 22,486 | 5,550 |
| Sturgeon County | 10,202 | 13,677 | 16,426 | 18,665 | 21,155 | 10,952 |
| Bruderheim | 270 | 311 | 366 | 463 | 546 | 275 |
| Fort Saskatchewan | 7,959 | 10,664 | 11,937 | 13,917 | 15,169 | 7,210 |
| Lamont County | 1,118 | 1,162 | 1,232 | 1,337 | 1,399 | 281 |
| Strathcona County | 28,187 | 31,051 | 34,705 | 35,946 | 37,537 | 9,350 |
| Town of Lamont | 248 | 258 | 274 | 297 | 312 | 64 |
| Beaumont | 1,527 | 1,657 | 1,848 | 2,314 | 2,723 | 1,197 |
| Calmar | 558 | 624 | 682 | 825 | 927 | 369 |
| Devon | 1,477 | 1,751 | 1,938 | 2,403 | 2,723 | 1,246 |
| Leduc City | 6,991 | 7,705 | 8,670 | 10,331 | 11,314 | 4,324 |
| Leduc County | 15,335 | 18,075 | 23,691 | 33,605 | 48,155 | 32,820 |
| New Sarepta | 152 | 162 | 176 | 201 | 216 | 64 |
| Thorsby | 547 | 591 | 645 | 725 | 770 | 223 |
| Warburg | 387 | 408 | 439 | 479 | 509 | 122 |
| Enoch | 1,198 | 1,321 | 1,485 | 1,737 | 1,865 | 667 |
| Parkland County | 7,106 | 8,907 | 11,639 | 13,649 | 17,347 | 10,241 |
| Spruce Grove | 7,440 | 7,771 | 8,018 | 9,193 | 9,857 | 2,417 |
| Stony Plain | 4,947 | 5,178 | 5,388 | 6,073 | 6,224 | 1,277 |
| Wabamun | 336 | 345 | 363 | 386 | 394 | 58 |
| Wabamun IR | 208 | 227 | 252 | 295 | 317 | 109 |
| Region Total | 117,847 | 134,581 | 154,226 | 180,270 | 209,629 | 91,783 |
| Edmonton Total | 428,890 | 450,783 | 491,003 | 551,116 | 622,370 | 193,480 |
| Edmonton CMA | 546,737 | 585,364 | 645,229 | 731,386 | 831,999 | 285,262 |

Outside of Edmonton the modal share of employment trips taken today on publicly operated transit is negligible. However, the largest increase in jobs in the future occurs outside the City of Edmonton limits in Leduc, Sturgeon and Strathcona Counties. These are the areas where transit currently does not serve any employment areas, except locally within Sherwood Park.

Leduc County and the City of Leduc appear to have the best potential to capture more trips by combining travel to and from the International Airport, travel from Leduc residents working in Leduc County and Edmonton and bringing City of Edmonton residents to jobs in Leduc County. The job growth in Strathcona County and Sturgeon County are expected to be in relatively isolated areas in the Exurban Zone, and difficult to efficiently serve by transit. Public transit will be able to bring workers to the edge of the Exurban Zone; however, employers, van pools or private operators will have to transport the employees the final kilometres to their job site.

SECTION 5

INTERMUNICIPAL TRANSIT SERVICE

TRANSIT SERVICE DEVELOPMENT

The Diversity of Transit Service Markets

In large metropolitan areas such as the Capital Region, there are typically a diverse set of transit markets that can be defined conceptually by concentric bands of development that become progressively less dense and intense the further the distance from the central core.

► Urban Core (central part of a city)

- The mature and highly developed urban core will typically support a rich network of transit services that allow spontaneous travel to virtually anywhere in Urban Zone.

► Suburban Zone

- The suburban band of development surrounding the urban core is typically characterized by much lower density of development with transit capture opportunities being quite dispersed and far apart. For this type of environment, it is appropriate to utilize focal points to connect to other areas, provide good commuter service to key destinations and provide less service on weekends and evenings in neighbourhoods.

► Exurban Zone

- The Exurban Zone in a metropolitan area is often physically detached from the main city and involves stretches of travel with little or no ridership capture opportunities. This type of environment lends itself well to extensive use of Park and Ride, good commuter service to key destinations, or intermodal hubs and minimal local circulation routes.

► Rural Zone

- Rural zones are typically so sparsely settled that they cannot support anything resembling regular transit service; in rural areas that are on the periphery of a major city, it is typically appropriate to consider minimal “lifeline” service by commercial carrier or some integration with specialized (e.g. Handibus) service.

Figure 4 shows how these conceptual bands of development may be applied in the Capital Region. The inner (urban) band, extending approximately to the inner belt (Yellowhead/Whitemud) should have excellent levels of transit service at all times. The level of transit service should support spontaneous travel by transit throughout the day. The middle belt, including suburban Edmonton and extending to include the contiguous municipalities of St. Albert and Sherwood Park needs to have excellent commuter service to the urban core and basic levels of local services, while the exurban areas beyond require a less dense network of commuter lines and 'lifeline' levels of local transit. When considering suburb to suburb service in the exurban area, it is noteworthy that Strathcona Transit has not found it feasible to serve major industries in their jurisdiction, and St. Albert Transit was unable to find partners to help fund a service to a major regional employment centre such as the Edmonton Garrison. Beyond the exurban areas of the Capital Region, land uses are primarily rural, with no significant population nodes or industrial development.

Regional Transit in the Capital Region will be discussed in terms of these development zones, and the scenarios will be developed on a set of "quick wins" to be implemented as the governance and financing issues are resolved. The improvements will be based on a long term vision for transit.

The Urban Zone

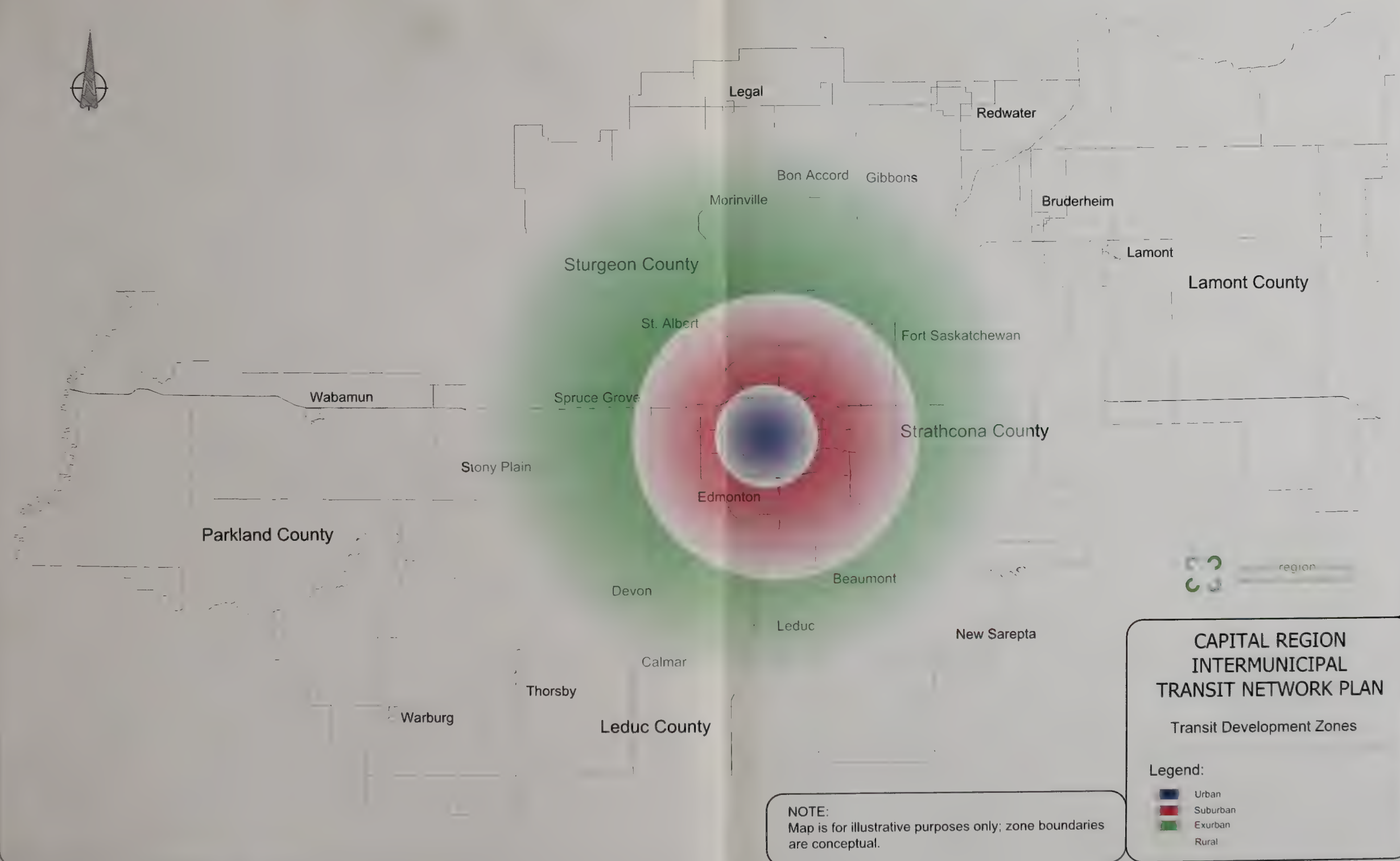
This zone lies entirely within the City of Edmonton, generally within the "inner ring loop" formed by Whitemud, Yellowhead, 170th and 75th Streets. As provided in the Edmonton Transportation Master Plan, the transit network in this area will provide extensive coverage and frequent services that will make it an attractive option for most trips. There will also be good service to major focal points in the adjoining Suburban Zone. Services within the Urban Zone will be operated with buses and light rail transit.

The Suburban Zone

The Suburban Zone extends from the inner ring (Whitemud/Yellowhead) to the contiguous suburbs at or beyond Anthony Henday Drive. It includes St. Albert and Sherwood Park, as well as communities such as Summerside and Blackmud in Edmonton.

In the Suburban Zone, the service will be designed based on the timed transfer focal point system. There will be a network of transit terminals linked to each other, as well as frequent corridor service to downtown and the University of Alberta. There will be local service to industrial and residential subdivisions, although late night and weekend service will be less extensive than in the Urban Zone. As contiguous development extends outward, the zone may grow. Major Park and Ride facilities would be provided at the suburban – exurban boundary where the LRT lines terminate.

Figure 4



The Exurban Zone

One of the major challenges in the Capital Region for transit is serving the growing, major industrial base in the Exurban Zone. These industries employ hundreds of workers who come from all parts of the Region, many of whom also work shifts that extend beyond regular transit hours. These industrial locations are widely dispersed and are located in areas without pedestrian amenities (e.g. sidewalks) or efficient access routes for transit. During the construction phase of major industrial and petro-chemical projects, when employment is actually higher than during production, employees often benefit from employer-provided transportation to work. However, when these facilities are completed and enter normal operation, transportation is often left up to individuals who revert to single occupancy vehicles for their access to work.

The Exurban Zone begins where the Suburban Zone stops, and extends outward from Edmonton to include all or most of the population nodes and industrial growth areas surrounding Edmonton. When service is provided it would ideally be by highway coach style buses operating on corridors with Transit Priority Measures with direct service to downtown, University of Alberta or to an appropriate rail terminal. A high quality commuter service would be provided with comfortable, high capacity vehicles. Local circulation in the population nodes would be provided however it would be not be frequent nor have a long span of service. Terminals near the boundary between the Exurban and Suburban Zones would also provide hubs for van pools and private sector services that would take workers to employment sites in the Exurban Zone.

Rural Zone

The Rural Zone extends beyond the boundary of the Exurban Zone, and conventional transit service would not be provided. This zone may continue to develop isolated pockets of residential and industrial development that are beyond the reach of transit.

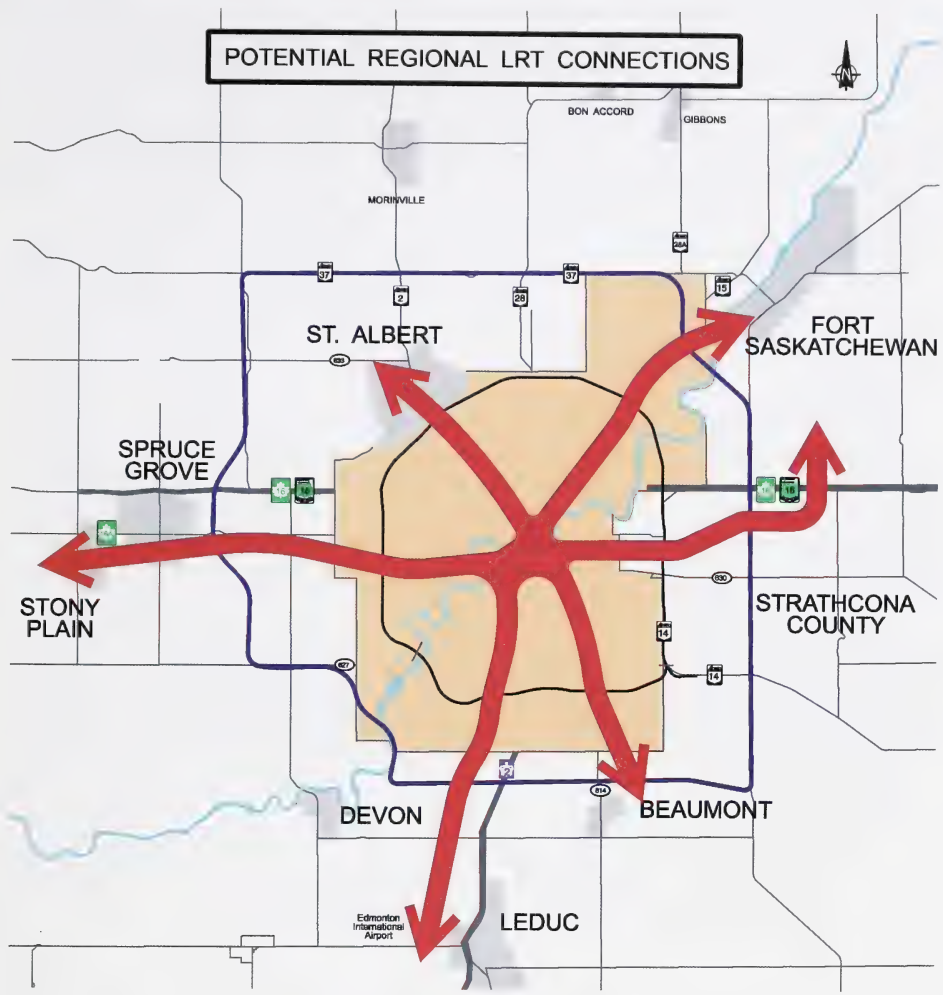
RAIL TRANSIT

Light Rail Transit (LRT)

Edmonton was the first city in North America with a population less than one million to build a modern light rail transit line in 1978. Since 1978, the line has been extended to Clareview in the northeast and to Health Sciences (University of Alberta) in the south. A major extension is now being built to Century Park in South Edmonton, and studies are underway for extensions to NAIT, St. Albert (northwest line), Mill Woods (southeast line), and west Edmonton via West Edmonton Mall (west line). Preliminary steps are also being taken to look at further extensions to Leduc County and Sherwood Park.

In general, the existing and potential extensions are being planned by the City of Edmonton to serve the area within the city limits of Edmonton. All studies provide an opportunity for extension beyond the Edmonton city limits. The City of St. Albert has agreed to contribute toward the effort to extend the northwest LRT line to their City and City of Edmonton staff has discussed extending the northeast LRT line as far as Fort Saskatchewan, and the south line as far as the Edmonton International Airport. Figure 5 shows a schematic network of existing and possible LRT lines in the City of Edmonton and the Capital Region.

Figure 5: Existing and Proposed Regional LRT Lines



The development of concentric ring roads, beginning with Yellowhead/Whitemud, then Anthony Henday Drive and ultimately with the Regional Ring Road have encouraged Edmonton to sprawl. Jobs, shopping and leisure attractions have consistently been attracted to the concentric ring roads. Downtown Edmonton has gradually become relatively weaker in terms of the entire Region. Today, downtown Edmonton has about 117,700 jobs, or twenty-seven percent of the regional jobs. In contrast, in 1978 when the LRT opened, downtown Edmonton had more than thirty percent of the jobs in the Region. Based on future projections, by 2043 downtown Edmonton is forecast to have about twenty-two percent of or 136,300 regional jobs. Overall, from 2008 to 2043, employment in the Region is expected to grow from 428,900 to 617,200. An increase of 188,300 jobs, with only 18,600 in downtown Edmonton. The downsizing and decentralization of Provincial government operations, and the growth of the University of Alberta, significant suburban industrial growth and the construction of circumferential highways have all contributed to the relative weakening of the Edmonton downtown core as the economic engine of the Region.

A light rail network that is radially oriented competes with the concentric freeway network. The freeway rings draw development away from downtown, while the rail investment is geared primarily to serving the traditional downtown market which is forecast to grow more slowly. In response to such decentralization and its negative effects on its downtown, the City of Edmonton has recently released a new draft Municipal Development Plan and Transportation Master Plan documents which focus on strengthening the downtown and intensifying land uses along premium transit corridors leading to the downtown.

The decentralization of cities is not unique to Edmonton. Other major Canadian cities such as Toronto, Montreal and Vancouver have addressed similar issues by building rail lines that do not enter downtown. The second subway built in Toronto was the east-west Bloor Danforth Line. In Montreal subway Line 5 (the fourth to be built) travels from Snowdon to Saint Michelle without touching downtown. Vancouver is now planning its fourth SkyTrain line from Broadway and Commercial to UBC along West Broadway, without entering downtown. All three 'cross-town' rail lines in Toronto, Montreal and Vancouver provide connections with the radial rail lines but primarily serve to facilitate suburb to suburb trips or cross town trips. These examples point to approaches that support urban areas by facilitating suburb to suburb rail travel without compromising radial travels to downtown.

Another challenge facing LRT development in Edmonton appears to be the limited capacity provided by the downtown LRT tunnel, which is a double track facility designed to Toronto Transit Commission subway standards. The downtown stations can accommodate five-car trains; however the current vehicle specifications and power traction system constrains the current system to a three-car or combination three/four-car trains. These constraints will be rectified by 2011 upon completion of a number of electrification upgrades. The shortest possible headways on the tunnel section are about 2 or 2.5 minutes, or about half of the current headway. Some of the proposed LRT extensions include up to two branches on a single line. If they were to both operate through the downtown tunnel, operational difficulties would result. The City of Edmonton recognizes the long term operating constraints within the downtown tunnel system and that the system cannot operate beyond a four-legged network. The City of Edmonton is currently undertaking a system wide review to develop recommendations on how a six legged LRT network could operate and provide the optimum system design given some of the challenges in Edmonton's downtown. This could involve lines beyond the core four legs along an independent alignment that would require transfers between lines. As noted above, this LRT network design approach is common to many public transit rail systems. It would be appropriate for Edmonton to complete its system wide network review and resolve the question of downtown connections before finalizing any of the extension studies listed above.

Long Distance/High Speed Rail

Long distance LRT extensions may be seen as solutions to urban transportation congestion or greenhouse gas emissions, but they can also have negative consequences. For example, extension of LRT to St. Albert and Sherwood Park would significantly reduce the role and fleet size of the two municipal transit operators. The vast majority of their revenue and ridership (passenger kilometres) would be assumed by the LRT network. If the local service in Sherwood Park and St. Albert continues to be a separate operator from the LRT service, a fare and revenue sharing agreement would likely be required.

A 2003 report prepared for the Alberta Capital Region Alliance (ACRA) noted that LRT might not be the best choice for extending LRT to the Edmonton International Airport (EIA) due to the relatively slow speed of the existing vehicles, the impact on Park and Ride lots from airport users, the long expanses of undeveloped or undeveloped land and the level of investment being made in competing roadways. For LRT to be a viable investment to the EIA, appropriate land use plans and station plans must be developed through Leduc County to support the LRT. Under such a scenario, LRT to the Airport could become a relatively short extension of service through suitable land uses, rather than a service to a destination that is far removed from contiguous urban growth. Land use policies that promote compact and contiguous development in conjunction with appropriate levels of transit service and constrained roadway capacity must be developed in order to realize the full potential of LRT development.

The ACRA report on Coordinated Municipal Transit also noted the loss of passenger rail lines into downtown Edmonton as a result of abandonments by CP Rail and Canadian National Railways. Rail access is still available as far as about 96th Street (requires new track south of Yellowhead Trail), from the south, via High Level Bridge to about 109th Street and Jasper Avenue, and from the west to about 107th Avenue and 120th Street (requires new track south of Kingsway Avenue).

Prospects for rail service to the Edmonton International Airport could be improved if an initiative to develop a high speed rail link between Edmonton and Calgary is pursued. A high speed rail link may be more appropriate and likely developed with the overnight paid parking required to attract intercity rail users. The incremental cost of serving the airport would be modest compared to extending an LRT line from Anthony Henday Drive to the Edmonton International Airport.

INTERMUNICIPAL TRANSIT SERVICE PLAN

Intermunicipal Bus and Light Rail Service

Good service planning is based on a thorough knowledge and understanding of trip patterns as well as projections of growth in population and employment. These projections help estimate potential transit demand and guide the type, extent, and timing of public transit services, as well as the required capital investments.

The Service Plan for intermunicipal transit in the Capital Region has been developed on the basis of potential land use scenarios considered during development of the Capital Region Growth Plan. When a final land use scenario is approved, the proposed Transit Service Plan can be revisited and adjusted, if required. For the most part, it is believed that the timing and volume of public transit, not the routing, may be impacted by such a scenario.

The Service and Route Plan represents a planning blueprint. Ultimately, decisions and deployment of intermunicipal transit by the Regional Transit Committee will be driven by the actual growth that is anticipated after completion and approval of the Plan.

In developing the Intermunicipal Transit Network Plan, a number of guiding principles were considered and adhered to as appropriate:

- Recognize and understand the different transit markets and invest accordingly and appropriately;
- Provide LRT only in congested, densely urbanized corridor;
- Provide non-stop or limited stop intermunicipal bus service;
- Provide Park and Ride lots and transit centres at LRT terminal stations and other strategic locations;
- Transit Priorities Measures on provincial highways and interchanges as/where needed;
- Transit Priority Measures where needed on all intermunicipal bus corridors within municipalities; and,
- Avoid roadway investments that compete with transit.

With specific reference to Park and Ride facilities, strive to follow the following guidelines:

- Develop Park and Ride at the ends of LRT lines at/near Anthony Henday Drive and on land where more intensive development is not possible or feasible.
- End of Line Park and Ride lots should have 800 to 1,000 stalls, subject to verification through detailed analysis.
- Park and Ride lots should be well lit and have plug-ins.
- Enact policies that facilitate the conversions of temporary Park and Ride lots to transit oriented development (TOD) upon extension of LRT.
- Provide secure bicycle parking.
- Consider Park and Ride pricing bundles (travel fare plus parking charge bundled together).
- Provide Transit Priority Measures into/out of Park and Ride/ Transit Centre area.
- Provide high levels of security and surveillance.
- Ensure good urban design.

In order to support the land use scenario that was assumed and outlined in Section 4, an intermunicipal transit Service Plan has been developed for the Region, highlighted by municipality, for several planning horizons. Some improvements are expected to take place before the horizon year. The proposed list of transit services by community and time horizon are shown in Figure 6. Figures 7 to 10 show the existing and proposed intermunicipal services for the short, medium and long term time frames.

These are for illustrative purposes to show the general direction of potential future intermunicipal transit routes. The actual location is subject to further development with municipalities as well as approval by the Regional Transit Committee and Capital Region Board.

FACILITIES AND EQUIPMENT

Regional Park and Ride Facilities

Regional Park and Ride facilities are relatively large Park and Ride lots with on-site transit centres that allow intermodal transfers between private cars, buses, LRT, van pools and if permitted, private transportation operators, including employer shuttles. The ideal location for these Park and Ride facilities is at the outermost future LRT stations, which in each corridor will generally be located in the vicinity of Anthony Henday Drive and preferably within the Transportation and Utility Corridor (TUC) around Edmonton. These Park and Ride sites are intended to attract traffic from the regional highways and can serve residents from multiple jurisdictions, including municipalities that are too small to support local transit service.

The TUC provides a good location for Park and Ride facilities, adjacent to the regional highways and with abundant open land. These locations near Anthony Henday Drive will not compete with intensification of land use at other more central and urbanized LRT station locations, or compete with urban sites designated for smart growth or transit oriented development.

The provision of Park and Ride facilities in the Capital Region should also be matched by land use policies that discourage or prohibit low density sprawl in the Exurban areas.

The proposed new Park and Ride facilities in the Capital Region are as follows:

| Community | Park and Ride Sites: Preliminary Timeframes | | |
|------------------------------|--|--|----------------------------------|
| | Short Term | Medium Term | Long Term |
| Edmonton | Lewis Estates Park and Ride (near Anthony Henday Drive / 87 Avenue) | Near northeast Anthony Henday(Gorman area) | |
| | | Near southwest Anthony Henday/ 127 St. | |
| | | Near southeast Anthony Henday/ 66 St. | |
| Sherwood Park | Near Baseline Rd. | | |
| St Albert | Near northwest Anthony Henday/St. Albert Trail | Near Hwy 2, north of Coal Mine Rd. | |
| Spruce Grove/ Stony Plain | Near east edge of Spruce Grove | | Near east edge of Stony Plain |
| City of Leduc | | Location to be determined | |
| Town of Beaumont | | | Near north edge of town |
| Fort Saskatchewan | | Location to be determined | |

Figure 6: Intermunicipal Bus and LRT Services

| Community | POSSIBLE TIME FRAME | | |
|--|--|---|---|
| | Short Term | Medium Term | Long Term |
| City of Edmonton | <ul style="list-style-type: none"> • LRT extended northwest to NAIT • New bus service to Refinery Row and neighbouring industrial area • Additional bus service to CFB Namao • Transit Priority measures along all intermunicipal corridors, as warranted | <ul style="list-style-type: none"> • LRT extended south to Anthony Henday/127 St • LRT extended northeast to Anthony Henday/Manning Drive (Gorman area) • LRT extended from NAIT to St. Albert • LRT extended southeast from Downtown to Anthony Henday Drive • New service from Belvedere area to Refinery Row and surrounding industrial areas | <ul style="list-style-type: none"> • LRT extended from Downtown west to Anthony Henday Drive near 87 Ave • LRT extended east from Downtown to Sherwood Park |
| City of St. Albert | <ul style="list-style-type: none"> • Additional bus service to downtown Edmonton, UofA and West Edmonton Mall • New bus service to Edmonton Northgate area • Transit Priority Measures along St Albert Trail to 118 Ave • New bus service to Morinville (reverse commute) | <ul style="list-style-type: none"> • Additional bus service to downtown Edmonton, UofA, West Edmonton Mall and Northgate • New bus service to Northeast LRT near Anthony Henday Drive (Gorman area) • Additional bus service to Morinville | <ul style="list-style-type: none"> • Additional bus service to downtown Edmonton, UofA, West Edmonton Mall and Northgate • Additional bus service to Northeast LRT near Anthony Henday Drive (Gorman area) • Additional bus service to Morinville |
| Town of Morinville | <ul style="list-style-type: none"> • Additional bus service to St. Albert | <ul style="list-style-type: none"> • Additional bus service to St. Albert | <ul style="list-style-type: none"> • Additional bus service to St. Albert |
| Strathcona County/Sherwood Park | <ul style="list-style-type: none"> • Additional bus service to downtown Edmonton • Additional bus service to UofA • Transit Priority Measures along Baseline Road/101 Ave. and Wye Rd./82 Ave. | <ul style="list-style-type: none"> • New bus service to Northeast LRT near Anthony Henday Drive (Gorman area) • New bus service to Southeast LRT near Anthony Henday Drive | <ul style="list-style-type: none"> • Additional bus service to Northeast LRT near Anthony Henday Drive (Gorman area) • Additional bus service to Southeast LRT near Anthony Henday Drive |
| Leduc County/Leduc/Town of Beaumont | <ul style="list-style-type: none"> • New bus service from City of Leduc/Leduc County to South LRT at Anthony Henday/127 St. • New bus service from Airport to South LRT at Anthony Henday/127 St. • Transit Priority measures on approaches to South LRT at Anthony Henday/127 St. • New bus service Beaumont to Millwoods | <ul style="list-style-type: none"> • Additional bus service from City of Leduc/Leduc County to South LRT at Anthony Henday/127 St. • Additional bus service from Airport to South LRT at Anthony Henday/127 St • New bus service from Beaumont to Nisku, and from Beaumont to Southeast LRT | <ul style="list-style-type: none"> • Additional bus service from City of Leduc/Leduc County to South LRT at Anthony Henday/127 St • Additional bus service from Airport to South LRT at Anthony Henday/127 St • Additional bus service from Beaumont to Nisku and from Beaumont to Southeast LRT |
| Spruce Grove/Stony Plain/Parkland County | <ul style="list-style-type: none"> • New/expanded bus service between Stony Plain/Spruce Grove and downtown Edmonton, West Edm. Mall, UofA with service to Acheson Industrial | <ul style="list-style-type: none"> • Additional bus service between Stony Plain/Spruce Grove and downtown Edmonton, West Edm. Mall, UofA with service to Acheson Industrial | <ul style="list-style-type: none"> • Additional bus service between Stony Plain/Spruce Grove and West LRT at Anthony Henday Drive near 87 Ave, with service to Acheson Industrial |

Figure 7

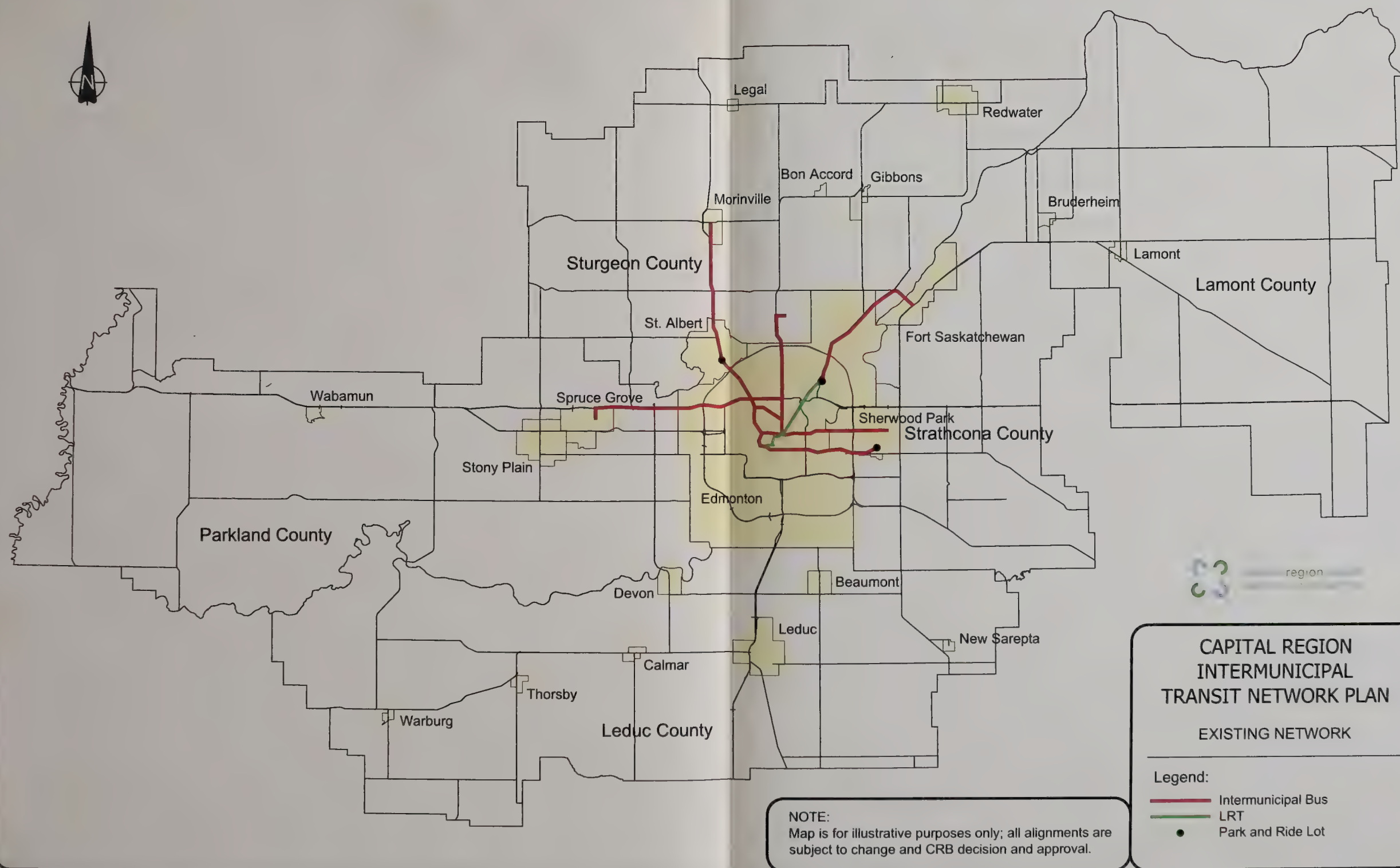
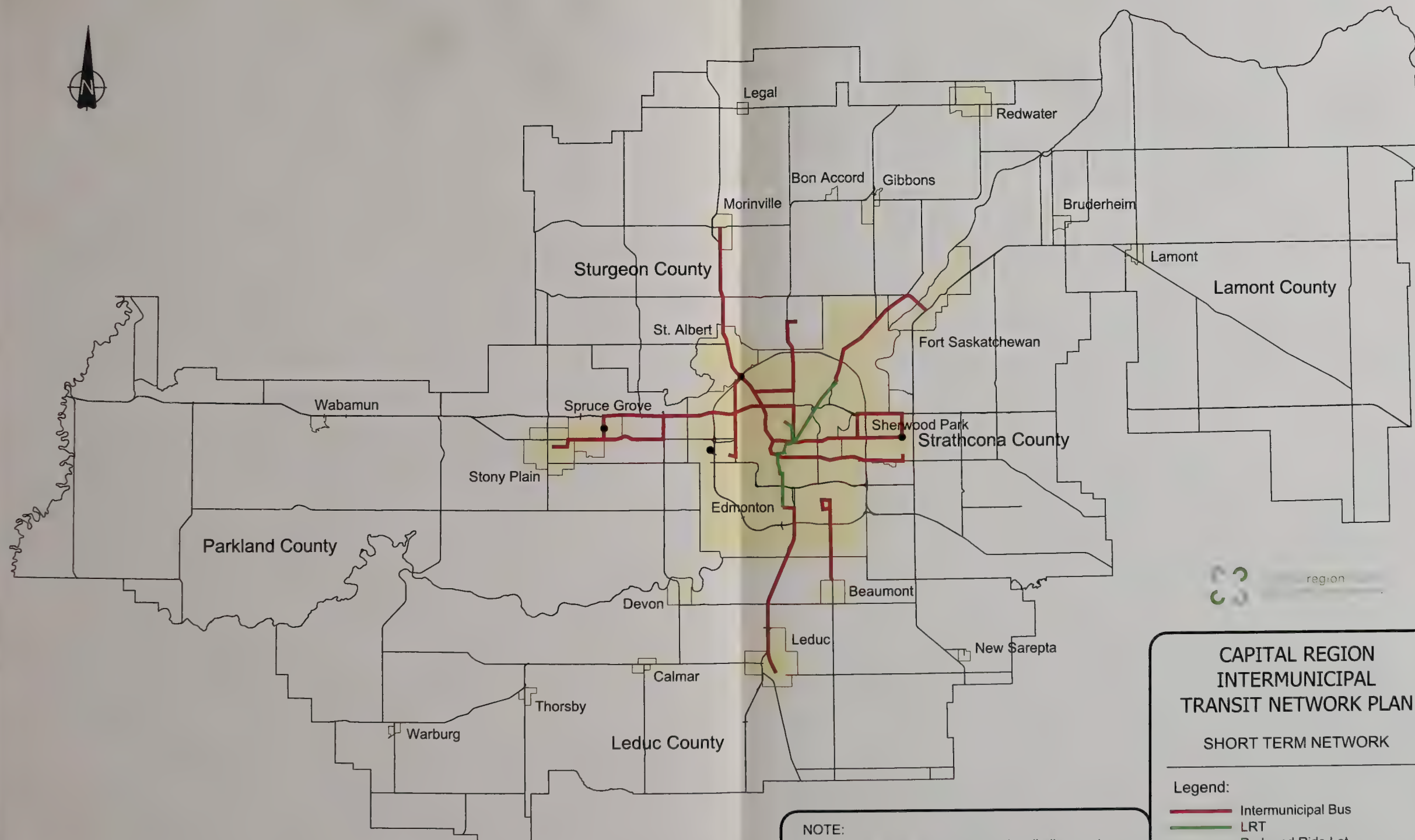


Figure 8



NOTE:
Map is for illustrative purposes only; all alignments are subject to change and CRB decision and approval.

CAPITAL REGION INTERMUNICIPAL TRANSIT NETWORK PLAN

SHORT TERM NETWORK

Legend:

- Intermunicipal Bus
- LRT
- Park and Ride Lot

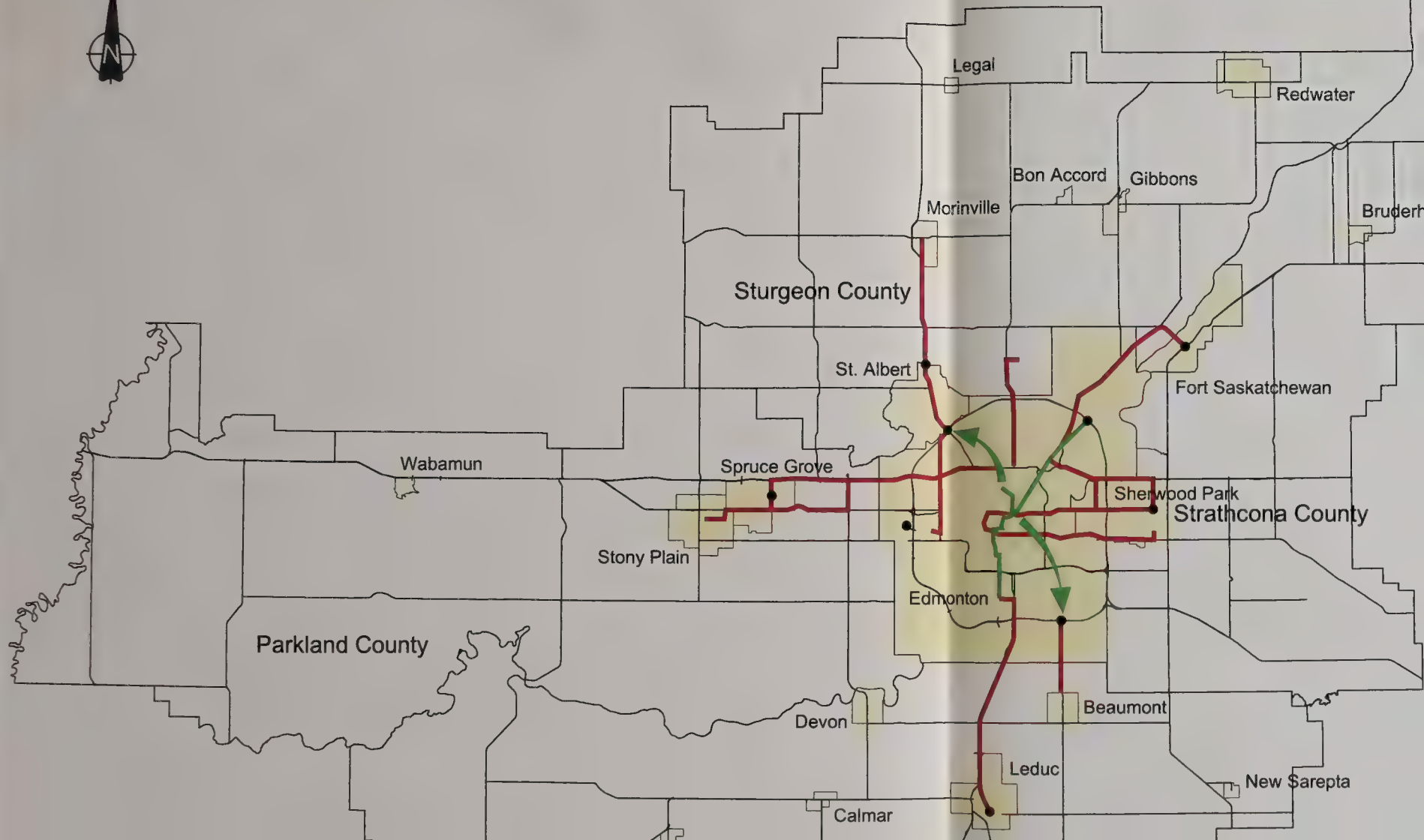
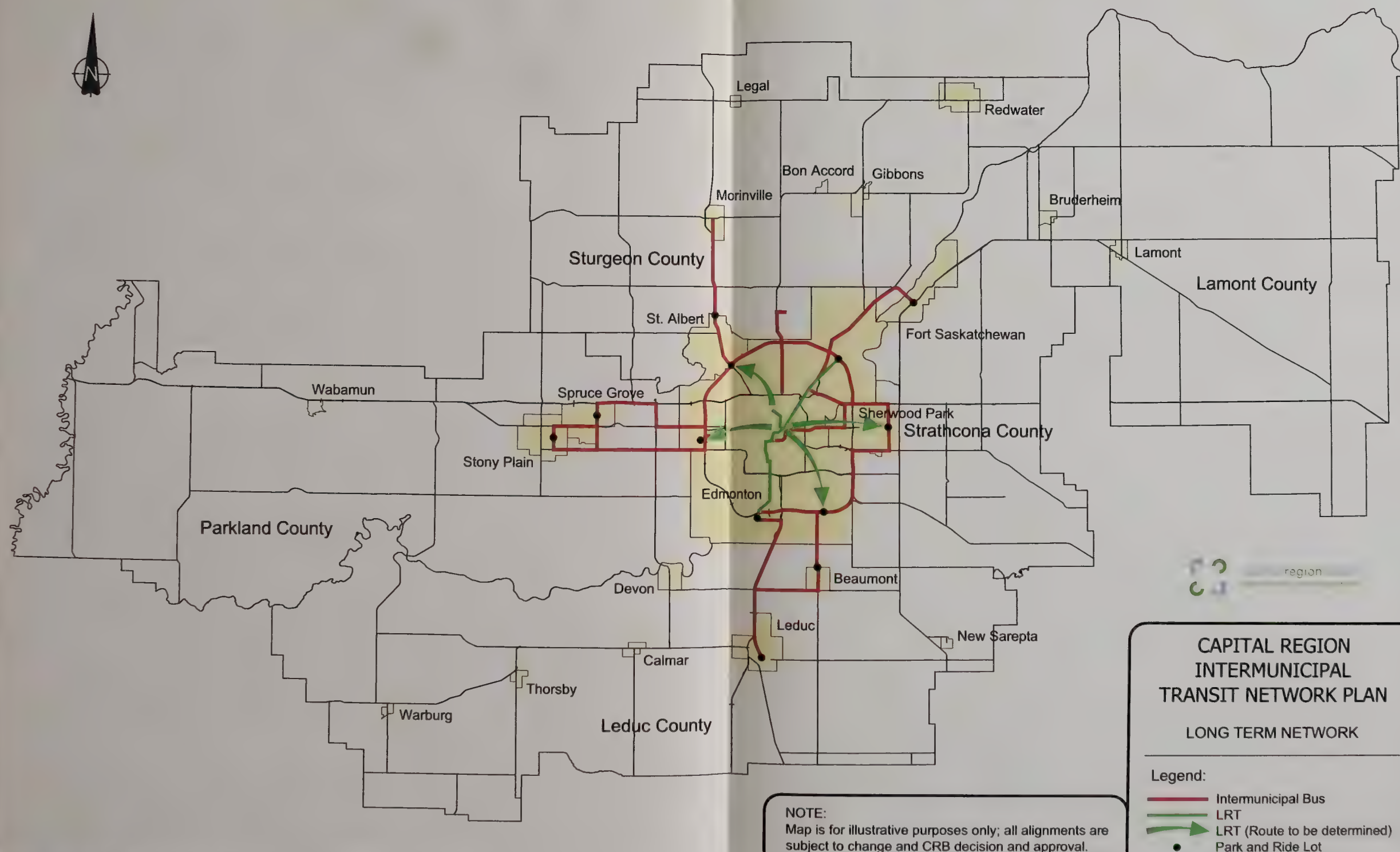


Figure 10



Vehicle Equipment

The three existing transit agencies have recently acquired three major types of vehicles, including standard twelve metre low floor buses (38 seats plus standees), low floor articulated buses (56 seats plus standees), and conventional highway coaches (no standees). Although some of the regional routes (e.g. St. Albert to Northgate to Refinery Row) discussed in this Plan can be operated successfully and comfortably on the standard twelve metre low floor buses, most of the services require vehicle capacities, or more comfortable accommodation due to their high-speed operation on highways.

Strathcona County has been operating standard highway coaches on some services; however, the agency is unhappy with the suitability of the vehicles for their role.

Spruce Grove and Fort Saskatchewan currently use standard low floor urban buses on intermunicipal runs on highways to Edmonton. Both of these services are expected to have load factors that suggest that alternative bus types may need to be considered.

In response to demands on current intermunicipal services, two new vehicle types are under consideration by transit operators in the Capital Region. ETS has created a new service bus by installing enhanced features in thirty-six seat low floor urban buses. Strathcona County has recently tested a low floor double-decker coach capable of carrying 76 - 88 passengers.

The specific bus types that will be purchased for intermunicipal transit services will be decided upon by the Regional Transit Committee on their merits in light of the needs that arise.

Complementary Roadway Investment Strategies

The scope of the Intermunicipal Transit Network Plan did not specifically include roadway and highway investment strategies that would be needed to leverage the proposed Transit Plan described herein.

While the absence of such a review is viewed as a significant strategic gap, this Plan represents some high-level guidance on the types of actions that are needed to ensure the effectiveness and value of the public transit investment being advocated in the

REGIONAL FARE SYSTEM

There are currently a wide range of transit fares within the Capital Region. Figure 11 summarizes the adult cash and monthly pass fares on each of the intermunicipal services operated in the Region, as well as local and ETS services. The fares offer a complicated mixture of local, commuter and integrated fare options.

St. Albert and Strathcona Commuter Pass holders can ride anywhere within Edmonton, St. Albert and Strathcona. Riders from Spruce Grove and Fort Saskatchewan must pay extra to ride on Edmonton Transit. Users from the Edmonton Garrison enjoy local Edmonton fares, but like all Edmonton pass holders must pay extra to ride any of the suburban services to St. Albert, Strathcona and Fort Saskatchewan.

Figure 11 also shows the typical cost per kilometre for each of the fare media types. The figure identifies that cash fares for trips to downtown Edmonton range from \$ 0.14 per kilometre from the furthest suburbs within Edmonton, to about \$ 0.29 per kilometre from St. Albert. When the cost per kilometre for pass holders is considered the cost ranges from \$0.09 for Edmonton residents to \$ 0.13 for people commuting to and from Fort Saskatchewan. The pass price comparison is based on forty trips per month, or two trips per working day. This is reflective of the maximum number of trips that could be made on a suburban service, such as Spruce Grove or Fort Saskatchewan, but on ETS, StAT and Strathcona Transit, the cost per kilometre could be much lower if a pass holder takes advantage of the availability of weekend, evening, midday and local service.

The fare system within the Capital Region is much more complex than just the examples shown in Figure 11. There are a number of different cash, monthly and annual concession fares for youth, students and seniors, annual passes, low income passes, several ticket purchase options for adults, students and seniors, and the U-Pass offered through the University of Alberta and Grant MacEwan College.

Figure 11: Capital Region Transit Fares

| Fare Type | Transit System | | | | | | |
|--|----------------|-------------------|--------|------------|------------|--------------|----------|
| | ETS | Edmonton Garrison | StAT | Morinville | Strathcona | Spruce Grove | Ft. Sask |
| | \$ | \$ | \$ | \$ | \$ | \$ | \$ |
| Adult Cash Local | 2.50 | 1.00 | 2.50 | 1.25 | 2.65 | 2.00 | 1.00 |
| Adult Cash to Edmonton | 2.50 | 2.50 | 5.00 | 8.50 | 4.50 | 5.00 | 6.00 |
| Adult Monthly Local | 66.50 | 66.50 | 50.00 | 61.00 | 47.00 | n/a | 89.00 |
| Adult Month to Edmonton | 66.50 | 66.50 | 80.00 | 141.00 | 82.00 | 110.00 | 155.00 |
| Monthly Transfer to ETS | n/a | n/a | 80.00 | 141.00 | 82.00 | 176.50 | 155.00 |
| Distance to Downtown Edmonton | 18.5km | 18.1km | 17.1km | 37.1km | 16.6km | 34.5km | 30.8km |
| Cost per km Cash to Downtown | \$0.14 | \$0.14 | \$0.29 | \$0.23 | \$0.27 | \$0.14 | \$0.19 |
| Cost per km Pass (40 trips) to Downtown Edmonton | \$0.09 | \$0.09 | \$0.12 | \$0.10 | \$0.12 | \$0.08 | \$0.13 |

Regional transit fares appear to be generally perceived as being reasonably priced, however the lack of access to ETS services for some intermunicipal travelers limits the attractiveness of the system. There are at least three potential approaches to fare integration.

1. In the first option each independent system sells its own fare products and retains all revenue, with the fare products accepted by other regional services. This is basically the method used by St. Albert and Strathcona County. ETS users must pay a premium to ride the suburban services. The agreement also allows ETS passengers to ride the suburban buses at ETS prices where there is no ETS local service.
2. The second option is in place for Spruce Grove and Fort Saskatchewan. The fare products for those services are not accepted on ETS or any other service, and passengers from Spruce Grove and Fort Saskatchewan must pay an additional fare to ride on ETS. Passengers are directly impacted by the lack of a regional transit system or at least, an integrated regional fare system.

3. The third system is fare integration, with a single unified tariff which allows for seamless movement around the Region. This type of system requires the transit operators to have in place a mechanism or formula for sharing revenue. An integrated tariff generally requires a more modern fare collection system than is currently installed on local buses including magnetic or smart card readers and media, although it can be operated with agreed to formulas or annual surveys.

Each of the current intermunicipal transit operations charges a unique fare that varies from the fare being charged at every other transit operation. A unified regional transit system should also have a uniform basis for setting fares based on overall farebox recovery targets. In a regional system there are many options for fares including:

- **Flat Fare** – The same cash and monthly pass prices are applied to the entire service area. For example in Metro Toronto anyone travelling from one block, to up to forty kilometres pays a flat fare of \$2.75 or \$109.00 per month. For comparison a service between Fort Saskatchewan and Sherwood Park would also be about forty kilometres and, with current practices, a passenger would be required to pay a Fort Saskatchewan fare, an Edmonton fare and a Strathcona County fare. In Toronto, a higher fare is charged for travel using the GO Transit commuter rail service which is generally for services beyond forty kilometres. Flat fares are the easiest to administer and market, but in large areas often the most inequitable.
- **Zone Fares** – Some systems have multiple zones with different pricing. Vancouver has three zones in effect from the start of service until 6:30 pm, and then a single flat fare. Zone 1 covers up to about sixteen kilometres, Zone 2 about thirty kilometres and Zone 3 allows travel of fifty kilometres or more. The fares range from \$2.50 cash and \$73.00 per month for one zone to \$5.00 cash and \$136.00 per month for three zones. A higher fare is charged for travel using the West Coast Express commuter rail service.
- **Distance-Based Fares** – Distance-based fares are not commonly used in North America for transit. Greyhound does use this method of calculating fares, including on the suburban routes near Edmonton. A fare-per-kilometre is applied to the specific distance being travelled. Distance based fares are among the most equitable means of charging transit passengers, but also one of the most complex to implement and difficult to explain. Variations can also include floating zones.
- **Peak Fares** – Systems with this type of fare charge more for travel during the peak hours as peak hour service generally costs more to provide than off-peak service. Fares during the peak are generally twenty-five to fifty percent higher than those charged on off-peak periods.

- › **Premium Service** – In some systems a premium fare is charged for premium service which may be based on the type of vehicle being used (e.g. Highway Coach) or the speed of the service (e.g. Express). Premium services generally have a surcharge of 25 to 50 percent or more in the case of Commuter Rail services that provide both a more comfortable ride, as well as faster service.
- › **No Transfers** – Free transfers have traditionally been offered on virtually all transit systems in North America, but are relatively rare in Europe and Asia. More and more U.S. systems are abolishing free transfers and encouraging passengers that must transfer to purchase unlimited-use Day Passes. These Day Passes are typically sold for a price that is between 2 and 2.5 times a single cash fare. The use of modern pass printing fareboxes has made this change relatively easy to implement and helps to speed boardings and reduces transfer disputes, one of the biggest headaches for bus drivers.

There appear to be a number of fare options that could be implemented in the Capital Region depending on the route structures and governance model that is adopted. Some of the potential strategies require new fare collection equipment. ETS has recently installed state of the art fare machines in its LRT stations. These machines are capable of reading smartcards; however, the fare collection system on board ETS buses utilizes non-registering manual fareboxes. The ETS fareboxes are unable to read any magnetic tickets, passes or transfer or any type of smart card. StAT and Strathcona use “Diamond” fareboxes that are also unable to read smart cards. New fare collection hardware and fare types could also allow innovations such as shifting away from fixed calendar month passes to rolling passes, and implementing best value strategies to help lower income riders afford monthly passes. Under a best value system individual fares are capped when someone pays enough cash fares equivalent to a monthly pass during a 31 day period. Rolling passes allow passengers to buy passes that are valid for a specific number of consecutive days beginning on any given day. This allows people with limited means to buy their pass mid-month rather than on the first when they can least afford it.

SECTION 6

SPECIALIZED TRANSIT PROVISIONS AND ACTION PLAN

EXISTING CONDITIONS

A broad range of transportation services are currently offered in the Region. In addition to the conventional or general public transit services previously discussed, municipalities throughout the Region provide specialized public transit services to seniors and persons with disabilities, general public Dial-a-Ride, and Taxi Scrip programs including:

- Demand Response Para/Specialized Transit: St. Albert, Edmonton, Strathcona, and Stony Plain
 - Advanced booked, door-to-door or curb-to-curb transportation for seniors and persons with disabilities
- Taxi Scrip: Fort Saskatchewan
 - Subsidized taxi service for seniors and persons with disabilities
- Dial-a-Ride: Devon (general public), cities of Leduc and Spruce Grove (seniors and persons with disabilities)
 - Provide both regularly scheduled and advanced booked/reservation service

In addition to these municipally funded services, there exist in virtually all municipalities, a range of volunteer driver programs, not-for-profit transportation services as well as some level of program (and client) specific social service transportation. These transportation services, such as Driving Miss Daisy, provide accompaniment and a level of attendant care not typically provided to seniors and persons with disabilities by the municipal specialized transit services. Appendix C highlights the features of these existing specialized transit services.

Region wide, there were close to one million specialized transit trips provided to seniors and persons with disabilities in 2008. Approximately one percent (10,000 to 12,000 were intermunicipal trips). A total cost of \$23 million or an average \$23.00 per trip, service was provided to approximately 11,500 registrants. There are approximately 170 in-service specialized transit vehicles in the Region.

From the profiling of existing specialized transit services in the Region, several key observations emerged including:

- › Intermunicipal service is limited and almost entirely restricted to trips into/from Edmonton.
 - Member municipalities fund the level of service determined appropriate for their community service area (and residents) reflecting local autonomy (administration, operations and service delivery).
- › A range (and large discrepancy) in service eligibility/certification processes, operating policies and procedures exist within the twenty-five municipalities.
 - This includes varying trip purpose restrictions for intermunicipal travel.
- › The level of intermunicipal specialized transit is typically less than that afforded to the general public including days of week, hours of day, service area, trip purpose, etc.
- › High commitment by existing transit operators to ensure accessible low floor vehicles enables use of general public transit by seniors and persons with disabilities.

LONG TERM INTERMUNICIPAL TRANSIT NETWORK

There is a clear opportunity to improve the availability of intermunicipal transit in the Capital Region. The delivery of specialized transit services for persons with disabilities, such as those provided by St. Albert, the City of Edmonton's Disabled Adult Transit Service (DATS) and Strathcona County's Accessible Transit (SCAT) service, as well as the services provided in the smaller urban centres, represents a broad spectrum of possible service options. This creates strategic and transitional planning challenges and financial pressures which are unprecedented within the transit and specialized transit industry.

The crux of the issue before the Capital Region is to:

- i. provide a level of intermunicipal specialized transit service that satisfies community requirements and expectations; and,
- ii. to determine how such service can be provided cost effectively within the context of an overall integrated strategic plan and collaborative arrangement.

The following represents considerations and alternative approaches to governance, administration and service delivery that were discussed in the development of the specialized transit approach, with the goal of maximizing the efficiency and effectiveness of the services provided within a framework of operational and service delivery integration.

Consideration has been given to:

- › Level of service, user perspective and cost-effectiveness;
- › Efficiency and effectiveness of operations and methods including alternate service delivery (and administrative) scenarios;
- › Appropriate future service direction and policy initiatives;
- › Ridership characteristics, user perceptions and attitudes; and,,
- › An appropriate course of action or transition plan for the implementation of initiatives and identification of the financial implications.

Guiding Principles

In advancing long term intermunicipal specialized transit provisions, consideration was given to the following guiding principles specific to transport services for seniors and persons with disabilities:

- Universal access including the provision of a level of transport service comparable to that afforded the general population and with an accessible infrastructure;
- Flexible mobility options with a cost-effective mix of accessible shared-ride, public transportation services; and,
- Maximize the utility and investment in accessible conventional transit (mobility management strategies) to encourage a shift from specialized to conventional public transit.

These guiding principles recognize the requirement for an accessible infrastructure including a commitment to the future procurement of accessible, low floor transit buses.

Service Attributes

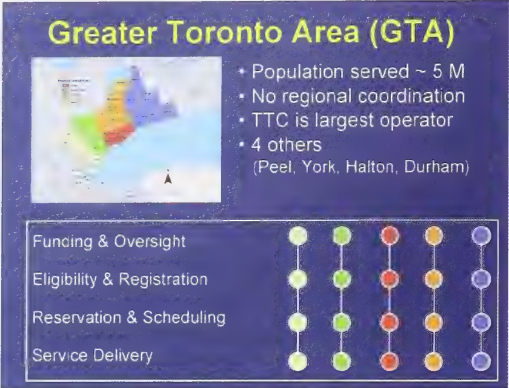
The guiding principles provide a framework for service attributes that describe the regional delivery of specialized intermunicipal transit services. This recognizes:

- Travel needs of residents in the urbanized and rural areas of the Region;
- Different functional disabilities and unique travel requirements of these diverse market segments;
- Efficiencies gained through the standardization of eligibility/certification processes, operating policies and procedures, etc.;
- The extent that accessible conventional transit may meet the mobility needs of seniors and persons with disabilities at the present time and in the future;
- A level of service comparable to that afforded the general population in terms of days of week, hours of day, area of service, etc.;
- Incentives and policies to address demand or mobility management opportunities; and,
- Fiscal responsibility and accountability (and the need to be cost effective).

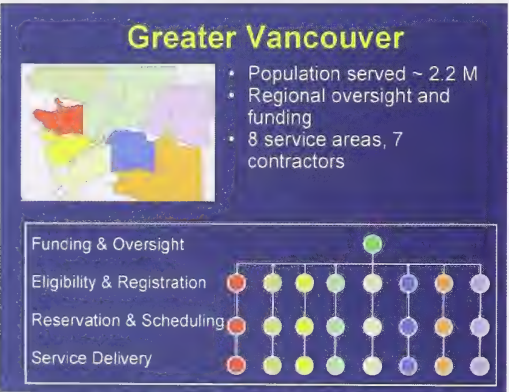
Consideration of Alternate Administrative/Operational Models: There are many possible models to deliver specialized transit intermunicipally throughout the Region. In considering alternate approaches and models, it is important to understand the key functionalities inherent in the delivery of transport services to seniors and persons with disabilities. These are illustrated below.

| Key Functional Areas | |
|----------------------------|--|
| Funding & Oversight | <ul style="list-style-type: none"> • typically regional agency, city or transit department • determines budget and other resource levels • planning and service monitoring |
| Eligibility & Registration | <ul style="list-style-type: none"> • determination of whether applicants are eligible for service • sometimes centralized, others left to service provider • large discrepancy in criteria and processes |
| Reservation & Scheduling | <ul style="list-style-type: none"> • taking trip requests • determining if and when trip can be accommodated • determines how drivers and vehicles can best meet needs • most systems moved to computerized scheduling |
| Service Delivery | <ul style="list-style-type: none"> • day-to-day operations • core services of buses and vans/often supplemental taxis • in-house and contract operations |

The following figures represent highlights from primary research regarding the delivery of intermunicipal specialized transit services in a regional setting from Canadian, American and European locations. These chosen “peer regions” illustrate the range of alternative approaches for the delivery of specialized or paratransit services. Each example serves a regional or multi-jurisdictional area and conveys the range of potential approaches including the centralization of one or more of the key functional areas. The key is to select a model, or to borrow from the various models the elements that best suit the Capital Region.



Multiple operating agencies (times five) each responsible for all functional requirements within their respective service area.



Multiple operating agencies (times eight) each responsible for all functional requirements within their respective service area with the exception of funding and program oversight.

Greater London, UK



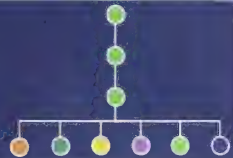
- Serves 7 million people
 - Funded by TfL
 - 6 operating depots

Funding & Oversight

Eligibility & Registration

Reservation & Scheduling

Service Delivery



Centralized functions with the exception of service delivery (times six operating depots)

Boston



- Population served ~4.5 M
- Service area has 5 zones
- 4 contractors operate in the outer zones
- All serve the core zone of the City of Boston

Funding & Oversight

Eligibility & Registration

Reservation & Scheduling

Service Delivery



Multiple operating contracts (times four) each responsible for trip booking/reservations, scheduling, dispatch and service delivery. Funding and program oversight as well as eligibility and certification are centralized and are the responsibility of the transit agency (MBTA).

A Way Forward

It is recommended that member municipalities continue to determine and fund the level of local service appropriate for their service area (and residents). It is recommended that oversight of intermunicipal specialized transit services be assumed by the Regional Transit Committee, allowing for integration with the general public transit service. With reference to the alternative models illustrated above, initially specialized transit in the Capital Region may replicate the Vancouver model of centralized funding and oversight (CRB/Regional Transit Committee) with each of the respective municipalities maintaining responsibility for their own eligibility and certification processes, trip booking/reservations and scheduling, and trip management/dispatch and service delivery. The consensus among municipal and transit officials in the Capital Region reflects a preference that would see the model transitioning to a variation on the Boston model.

The first two priorities, funding and oversight, will include the planning of specialized intermunicipal transit services and the development of fare policies as well as service and operational policies, the Regional Transit Committee will also assume responsibility for coordinating a uniform eligibility criteria and certification process specific to intermunicipal specialized transit. Local municipalities will maintain responsibility for operational/trip management and service delivery functions.

Over time, the Regional Transit Committee will oversee a “mobility manager” function for intermunicipal specialized transit services. Responsibilities will include information dissemination and the development of pertinent public policy.

Public policy considerations for intermunicipal specialized transit will be developed within a framework designed to:

- Preserve the integrity of specialized transit services for those persons with disabilities who are unable to use accessible conventional transit;
- Maximize the utility of the investments made by the respective transit agencies in accessible conventional transit and accompanying infrastructure;
- Provide flexible mobility options with a cost-effective mix of accessible shared-ride public transportation services;
- Recognize the legislative guidelines of the Alberta Human Rights and Citizenship Commission; and,
- Attribute cost of service delivery to the end user’s jurisdiction.

Of paramount importance is the need to meet the demand for service. Specialized transit services must be a complementary service, provided whenever conventional services do not meet customer needs.

In the absence of specific legislative requirements in Alberta, it may be useful for the CRB to consider lessons learned from the legislative environment in the United States for when addressing public policy considerations, eligibility and certification requirements. Faced with many of the same challenges, specialized transit services in the U.S. operate within an environment governed by the Americans with Disabilities Act (ADA). This civil rights legislation recognizes the rights of the individual to fair and equitable access to all the services afforded to all citizens. A key goal of the ADA is to include as many persons with disabilities as possible in all aspects of life. Thus, the accessibility requirements of the ADA are meant to ensure that persons with disabilities can use conventional public transportation without encountering preventable barriers. Specialized transit services are required only for those persons unable to use the accessible conventional transit system, and not for those who are reluctant or unwilling to use it.

The U.S. law intends for persons with disabilities to have equal access to facilities and to be able to participate fully in programs and services. Access to conventional transit must be provided.

A key goal ought to be that of integration and ensure that persons with disabilities can use public transportation without encountering unnecessary barriers.

Partnership with Conventional Transit: In spite of the growth in demand, growth in existing specialized transit services can be mitigated if more is done to ensure that persons with disabilities use conventional services whenever possible. Presently, the two systems (StAT and SCAT) are relatively independent. However, with the rapid conversion of the regular transit fleet to fully accessible units, there are more opportunities to use conventional bus services to meet some of the needs of many specialized transit customers.

The Regional Transit Committee can facilitate a more integrated approach between accessible conventional transit services and specialized transit services. The Committee can create a user friendly, accessible conventional service that attracts riders with disabilities away from specialized transit services. An accessible public transit system provides a higher degree of trip making flexibility and facilitates greater travel spontaneity and independence. A truly accessible transit system can become the preferred choice for many people with disabilities.

Partnership with Agencies: The structure of specialized transit services is changing due to shifts in provincial policy and funding scenarios for several agencies and organizations in the Region. There is a need to develop partnerships with social service agencies, the medical community and others in order to address the continuity of access to programs and services. (eg., refundable chit system).

Specialized transit is by definition, shared-ride, public transit for those unable to use accessible conventional transit services. It is important to preserve the integrity of specialized transit services for those individuals who have little or no alternate modes of travel. Typically, agency program requirements entail the transport of individuals who may not otherwise be eligible for specialized transit services. This may include persons with cognitive disabilities or mental illness.

Multiple Tiers of Intermunicipal Specialized Transit Service Delivery: The heterogeneous nature of the Region in terms of population densities, travel patterns, as well as trip attractors and generators will result in a range of transportation solutions or mobility options to meet the intermunicipal travel needs of the Region's seniors and persons with disabilities.

The range of transportation concepts include:

- Accessible intermunicipal conventional transit enabling local specialized or volunteer services to operate in a feeder mode for customers wishing to make intermunicipal trips;
- Current municipally operated specialized transit (i.e., St. Albert Handibus and Strathcona's SCAT) providing intermunicipal service within an amended operating framework of enhanced coordination of operating policies (i.e., eliminating trip purpose restrictions), trip booking, scheduling parameters, and service delivery (i.e., transfer sites in adjacent municipalities);
- Co-mingling of populations and joint use of vehicles for less frequent but regularly scheduled service linking the smaller urban/town communities including Calmar, Devon and Leduc with Edmonton. Each of the outlying municipalities may have a level of service appropriate for their travel needs and would serve the general public as well as seniors and persons with disabilities. Operating scenarios may include fixed-route with route deviation for those requiring curb-to-curb or door-to-door services.
- Lifeline services providing one or two day a week service providing connectivity between the rural portions of the Region and mostly the City of Edmonton; and,
- Integration with taxi services.

TRANSITIONAL ARRANGEMENTS AND ACTIONS

The delivery of intermunicipal specialized transit services will utilize existing transit infrastructure (vehicles, facilities and staffing). Near term transitional arrangements will focus on administrative and operational considerations, including the need to develop specific service policies and procedures to address:

- Eligibility and certification;
- Reciprocal eligibility and the populating of the client data base for multiple service providers/ municipalities;
- Trip booking procedures including advance booking requirements and subscription rules as well as trip booking coordination;
- Scheduling parameters including scheduling windows;
- Computer/scheduling software applications including opportunities for remote user status;
- Expanded and improved fleet mix as well as the use of supplemental taxis (which may require stricter taxi regulation or the use of performance-based contracts to ensure the quality of taxi operations);
- Service planning identifying levels and span of service for various service types;
- Regional operation considerations including transfer locations and parameters for transfer trips; and,,
- Marketing and communications strategy.

FINANCIAL CONSIDERATIONS

A five-year capital and operating budget estimate will be prepared following confirmation of a preferred approach to service integration and a prescribed level of service for each of the service types presented.

Cost considerations will reflect the net impact on the respective transit providers for any additional levels of service provided and administrative burden incurred. In terms of the former, the elimination of trip purpose restrictions for intermunicipal travel will increase the demand for these services for both the St. Albert and Strathcona County services. However, modifying their mode of service delivery (i.e., introduce fixed scheduled specialized transit service) will mitigate much of the impact of increased travel demand and subsequently, the operating budget. Similarly, enhanced integration with conventional transit including co-mingling of passenger populations on services serving outlying municipalities will minimize budgetary impact for intermunicipal transit services. The introduction of “lifeline” services or any new service start ups will be new operating costs.

There will be additional administrative burden for both the Regional Transit Committee (responsibilities previously discussed) and the local municipalities. The latter will likely have to address amended eligibility and certification processes; populating their respective client data bases with registrants from adjacent municipalities, coordination/dialogue with scheduling/dispatch staff from adjacent municipalities, etc.

Ancillary cost considerations include potential expenses in common or shared technology support and licensing (e.g., setting up remote user status of Edmonton’s scheduling software by St. Albert, Strathcona and others). Longer term consideration may be given to building on the shared access to the scheduling software with the procurement of compatible mobile data terminals (MDTs) and automatic vehicle locating (AVL) capabilities to facilitate real-time arrival information for timed transfers and assist in other communication between systems (and possibly drivers).

SECTION 7

GOVERNANCE FRAMEWORK FOR INTERMUNICIPAL TRANSIT

CONSENSUS ON PRINCIPLES

Following the meeting with the Blue Ribbon Panel on November 21, 2008, discussions continued among elected officials and other key stakeholders on the Capital Region Board (CRB) regarding the preferred governance structure for expanding and improving Region-wide public transit. A consensus emerged from these discussions that the most appropriate governance structure for the Region would be a “hybrid” of the two options presented to the Panel, wherein a permanent Regional Transit Committee of the CRB would oversee a broad range of transit implementation and oversight responsibilities, relating to intermunicipal public transit services. This section describes that recommended governance structure and identifies key issues that the CRB will need to address as it moves toward implementation.

In the course of the Blue Ribbon Panel meeting and subsequent discussions about the governance structure and allocation of responsibilities, a few key principles emerged that should guide the implementation in the coming months:

- ▶ **Functional responsibilities must be distributed along a continuum.** The highest level activities (such as long-range planning, funding advocacy, and branding) should reside at the regional level, while responsibility for day-to-day service provision should remain the responsibility of the local jurisdictions. Between these two extremes, there will be a distribution of responsibility appropriate to the particular function, which will require contracts and coordination (both formal and informal) between the regional authority and the local jurisdictions.

- **Responsibilities will evolve over time.** The Public Transit Committee of the CRB has moved quickly and decisively in identifying a preferred governance structure. However, as the process moves toward implementation, there has been recognition of the need to take a measured approach to granting responsibilities to a new regional transit entity. Some of the local jurisdictions have the physical assets, the personnel, the financial capacity, and the expertise, and any new regional entity will need time to build up similar resources. Over time, however, as regional transit expands and users come to view the system as a coherent whole, it is anticipated that more responsibility will be transferred to the regional entity.
- **The CRB must focus on “quick wins” for transit.** The CRB must identify a set of transit-focused investments that can be implemented quickly and that will produce tangible benefits for travelers in the Capital Region. Identifying these “quick win” projects has a two-fold importance. First, the Provincial government has funding available immediately for such projects through its “Green TRIP” Program and the Region must not lose the opportunity to access these funds. Second, and perhaps of greater importance, the successful implementation of these near term projects by the CRB will provide the new regional transit entity with significant credibility, without which the long term goals of dedicated regional funding and a fully integrated transit system will be very difficult to achieve.

MANDATE

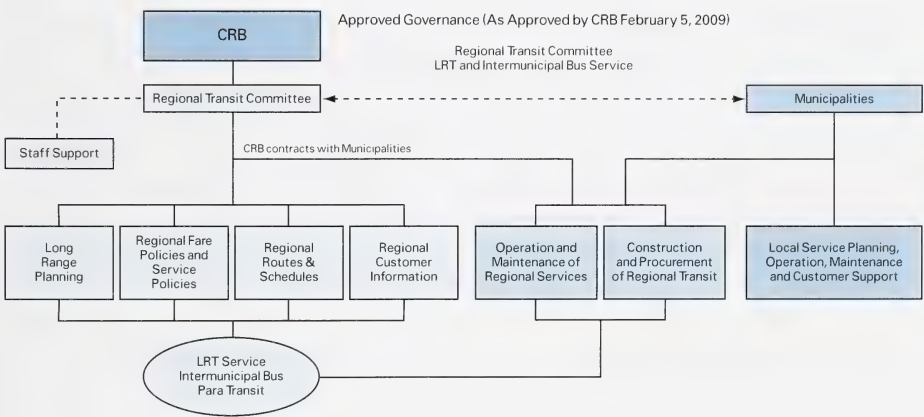
The recommended governance structure for intermunicipal transit services in the Capital Region is to be based on the definition of a new entity, which reports to the Capital Region Board, and whose mandate consists of the following:

- Advocate for and continually promote the Capital Region’s Intermunicipal Transit Network Plan;
- Represent regional interests, while recognizing and giving due consideration to local issues and preferences;
- Provide strategic direction for deployment of intermunicipal transit facilities and services
- Set priorities for deployment of capital and operating resources;
- Develop of a rolling three-year Business Plan;
- Develop capital and operating plans;
- Set standards for intermunicipal transit services;
- Provide oversight of intermunicipal transit services to ensure adherence to Regional Land Use Plans and regional service standards;
- Report regularly to the Capital Region Board; and,
- Seek the CRB’s approval on business plans and related capital and operating budgets.

STRUCTURE AND RESPONSIBILITIES

The following chart shows a schematic representation of the recommended governance structure for the new regional transit entity.

In this model, a permanent Regional Transit Committee (RTC) accountable to the CRB would be formed, with committee representation drawn from a subset of the full CRB membership. The RTC would be charged with delivering a fully integrated and coherent regional transit network, including the planning, design, construction and operation of any new intermunicipal public transit services. The RTC would also be responsible for ensuring the continued delivery of existing LRT and intermunicipal bus routes, although it would be expected to contract back with the existing local providers for those services. The local providers would continue to be responsible for the planning and operation their purely local bus services. A brief summation of the expected long term allocation of responsibilities is provided. As noted above, CRB members have agreed that the regional governance should evolve toward this arrangement over time.



Regional Transit Committee Functions

► Long-Range Planning

- Undertake planning for all regional services including LRT, intermunicipal bus, and intermunicipal specialized transportation services, including:
 - Network Planning: Update and expand current long-range plans.
 - LRT: Develop functional plans and detailed designs; purchase of right-of-way with intention to build and transfer.
 - Bus corridors: Develop busway plans and detailed designs; purchase of right-of-way with intention to build and transfer; plan for eventual upgrade to LRT.
 - Park and Ride Facilities: Develop functional plans and detailed design with intention to build and hand over.
- Ensure that all regional transit planning is coordinated with regional land use and transportation planning.
- Provide a “single voice” presentation of funding requests to other orders of government.
- Pursue new sources of funding from the Provincial government and private sector.
- Satisfy local authorities that their needs are appropriately represented and that there is room for local authorities to pursue grants for unique projects.

► Service Policy

- Develop intermunicipal service policies and standards including, but not limited to: passenger loading, travel time, and travel conditions.
- Reconcile current policies and practices to provide a consistent definition of “regional service” based on objective measures such as travel time, rather than existing municipal boundaries.

► Fare Policy and Fare Collection System

- Develop a common system for intermunicipal fares with a system for revenue and cost sharing, including a common technology to support this system.

► Marketing/Branding

- Create and maintain a unified regional transit brand identity.
- Provide marketing and promotion of transit as a viable transportation option for discretionary riders.

► **Customer Information**

- Provide customer information (via printed materials, telephone, online, and in stations) for all services from a common database.

► **Specialized Transportation**

- Develop a common trip dispatching system to implement consistent regional service objectives.

Local Transit Authority Functions

► **Operations and Maintenance**

- Responsible for all operations and maintenance of LRT, bus, and specialized transportation services, whether operated in local service or in regional service on behalf of the RTC.

► **Procurement**

- Local purchase of buses and LRT vehicles, with regional input to standardize specifications and consolidate orders where practical.

► **Construction**

- Local construction of major capital investments, with regional project management to standardize specifications and support regional services.

► **Planning and Scheduling**

- Short term planning of both routes and schedules for local services.

► **Customer Service/Marketing**

- Localities will provide marketing, promotion, and customer service for local service.

► **Specialized Transportation**

- Customer service and operation of local and intermunicipal services.

Joint Regional and Local Responsibility

There are some functions that will, by their nature, necessitate joint responsibility. As noted above (Local Transit Authority Functions), local transit agencies will continue to operate and maintain intermunicipal transit services under contract to the Capital Region Board. Similarly, construction of transit infrastructure and procurement of transit vehicles will be carried out by the local jurisdictions as they have the expertise and facilities to undertake these functions on behalf of the Capital Region Board.

KEY ISSUES AND NEXT STEPS

As the CRB begins to move toward implementation of the Regional Transit Committee concept, a number of key issues are likely to surface, and the CRB will need to be prepared to address each one.

- **Funding:** Funding continues to be the “elephant in the room” for the RTC concept. In the near term, the provincial “GreenTRIP” Program will presumably provide funding for some critical “quick win” projects, such as ITS investment in buses and the implementation of a single Region wide fare medium (such as a smart card). However, the prospects are very uncertain for any long term dedicated funding for either major capital investments (such as an LRT expansion) or for ongoing operations and maintenance. A consistent and concerted advocacy effort for dedicated funding – at both the regional and provincial levels – should be one of the first efforts of the new RTC.
- **Cost Allocation:** The CRB already has in place a formula for allocating the cost of planning studies and other ongoing projects to the member jurisdictions. There is currently no framework in place for the sharing of the capital and operating costs of an intermunicipal transit plan. As it moves to implementing the intermunicipal transit plan through the RTC, the Capital Region Board will need to develop and seek provincial approval for a new cost allocation formula that will allow for the reasonable and equitable sharing of the costs of intermunicipal transit facilities and services in the Capital Region.
- **RTC Staffing:** All the transit expertise in the Capital Region currently resides with the local providers. The CRB and RTC will need to decide how to support their regional transit responsibilities through a combination of new staff (directly employed by the Capital Region Board Administration on behalf of the RTC), coordination/contracting with staff from the local jurisdictions and third party contracting.
- **Composition of the RTC:** The full CRB has single member representation from 25 jurisdictions in the Region. For the new RTC, a smaller yet representative subset of those representatives will be needed.

The composition of the RTC must respect the significant role and investment of the three municipalities currently operating transit municipally and intermunicipally. Furthermore, the composition of the RTC should acknowledge and leverage the significant expertise of the three existing transit operators, Edmonton Transit, St. Albert Transit and Strathcona County Transit as intermunicipal transit responsibilities transition and evolve to the RTC. The proposed composition also helps enable implementation, and ensure seamlessness in the “shared responsibilities” area. The proposed composition of the RTC is as follows:

Proposed Membership:

| | |
|---|----|
| ➤ Voting Members (elected officials) | 9 |
| ➤ Non-Voting Members (unelected administrative staff) | 5 |
| ➤ Total Committee Members | 14 |

Proposed Voting Members (each with a designated alternate):

- City of Edmonton (Current Transit Operator)
- Strathcona County (Current Transit Operator)
- City of St. Albert (Current Transit Operator)
- Six other municipalities including Cities, Towns and another County
These would be determined through nomination and/or election by the CRB.

Proposed Non-Voting Members:

| | |
|----------------------------|--|
| ➤ City of Edmonton: | Transit Operational Leader (Advisory) |
| ➤ Strathcona County: | Transit Operational Leader (Advisory) |
| ➤ City of St. Albert: | Transit Operational Leader (Advisory) |
| ➤ Government of Alberta: | ADM Alberta Transportation Department (Liaison) |
| ➤ RTC Staff Support/Admin. | Transit Executive (ex-officio/Administration Lead) |

Committee Quorum:

- Five voting members.
- Absence represents a vote in favour.

When selecting the six other municipalities, consideration should be given to ensuring Committee representation reflects the likely evolution/expansion of intermunicipal transit during the term. The CRB may decide certain voting positions will be rotational, perhaps annually.

- › **RTC Voting:** Committee recommendations and decisions require a simple majority (i.e. five of nine) including unanimous support among the three current transit operators of St. Albert, Strathcona County and Edmonton.
- › **Committee Charter:** Once established, the inaugural RTC will need to develop a more comprehensive charter for the Committee, for approval by the CRB. This charter should include considerations such as: term and rotation of RTC membership; adding new participating members as intermunicipal service expands; refining voting structures as other jurisdictions acquire significant transit capita; dispute resolution and other items that arise.

SECTION 8

TRANSITION AND IMPLEMENTATION PLAN

The transition from the current transit operating framework into a more regionally coordinated one for the Capital Region will need to evolve in three broad phases as follows:

- › Legislative and Regulatory Adjustments
- › Formation and Setup of the Regional Transit Committee
- › Implementation of the Plan

While these phases represent the logical sequence in which these activities should be initiated, they may very well be undertaken concurrently to ensure quick progress toward implementation.

This Plan is intended to provide guidance to the Capital Region for regionally integrated and coordinated transit service planning and delivery. The Plan reflects a shared commitment, responsibility and accountability for the planning and delivery of intermunicipal transit services in the Capital Region.

LEGISLATION AND REGULATION

The Capital Region Board has, through legislation and regulation, been mandated to develop the Capital Region Growth Plan, but has not explicitly been charged with its implementation. Accordingly, there may be a need for the Provincial government to explicitly set out the Board's ongoing future mandate. In particular, as it relates to both the Land Use and Transit Plans, these legislative adjustments may also involve the Municipal Government Act which currently governs the responsibilities and powers of municipalities in Alberta.

The changes in legislation and/or regulation could range from providing the Capital Region broad latitude to oversee ongoing implementation as it see fit, or, it could require that the CRB act in a highly prescribed manner. The governance framework that has been arrived at in this Plan has assumed that the Capital Region Board would in fact have the latitude to carry out the implementation of the Plan in a relatively unencumbered fashion. It is anticipated that the recommended decision-making processes and implementation structure for intermunicipal transit will be accepted by the Province and suitable legislation enacted.

FORMATION AND SET-UP OF REGIONAL TRANSIT COMMITTEE (RTC)

On the basis that the Capital Region Board will be charged with implementation and ongoing responsibilities for intermunicipal transit, the Board will need to develop policies and procedures that specify:

- The mandate, authority and responsibilities of the RTC;
- The process for selecting members of the RTC;
- The resources that will be available to the RTC;
- The manner in which the chair of the RTC will be selected; and,
- The terms of RTC membership.

REGIONAL TRANSIT BUSINESS PLAN

Once the Regional Transit Committee is established, the following key decisions and actions will need to be undertaken:

- Hire support staff, including:
 - A lead executive who is experienced and conversant with all aspects of public transit particularly in a multi-jurisdictional environment; and,
 - Appropriate technical and non-technical support staff.
- Develop a Business Plan:
 - The initial Business Plan will need to define the initial plans, actions and activities related to implementing intermunicipal transit with a focus on the transitional protocols and agreements for planning and operation of intermunicipal transit services. Priorities will be guided by the policy and direction in the Business Plan.
- Identify the specific implementation priorities with a focus on the “quick wins” that best serve to establish confidence and credibility for the Regional Transit Committee.
- Establish priorities for intermunicipal transit services beyond the initial quick wins.

QUICK WINS

There are a number initiatives and projects that the Regional Transit Committee (RTC) can consider as “quick wins” that will yield immediate benefits to the Capital Region. The regional service plan outlined in this document offers a number of opportunities for “quick wins”. The following list of potential “quick wins” is provided for the RTC’s consideration:

- Hire the lead Transit Executive and support staff to assist the RTC in setting up an organization that will enable the RTC to reach its goals.
- Develop the cost allocation formula for sharing of costs of intermunicipal transit services.

- Establish a regional fare system; include the identification of a consistent Region-wide fare system for intermunicipal transit, as well as specific fare levels that would go along with such a fare system.
- Purchase new buses to serve growing regional demands consistent with priorities established in the RTC's business plan and specific priorities outlined in Section 9 of this Plan.
- Plan and guide the construction of regional Park and Ride facilities that would complement new and expanded regional bus services.
- Establish a regional Customer Information System and materials to facilitate convenient public access to integrated regional route and schedule information.
- Establish a regional brand and identity for intermunicipal services in a manner that promotes the regional integration with recognition for localized autonomy and flexibility.
- Identify and acquire land needed for the three known future intermunicipal transit facilities (roadway/rail alignments, transit stations, Park and Rides):
 - Edmonton: vicinity of 127 Street and Anthony Henday Drive
 - Sherwood Park: vicinity of Baseline Road
 - St. Albert: vicinity of St. Albert Trail and Anthony Henday Drive.
- Identify and implement where appropriate, specific Transit Priority Measures along intermunicipal transit corridors.

FUNDING ADVOCACY

At the present time there is no provincial operating assistance to municipal transit agencies in Alberta. The establishment of a regional intermunicipal transit plan for the Capital Region has highlighted the urgent need for a stable and ongoing source of operating funds for intermunicipal transit services. The widely dispersed nature of the Region's cities and towns places a difficult funding burden on municipalities that may have a need for service but not the financial capacity to address such needs in a meaningful way.

The Regional Transit Committee could, with the full support of CRB member municipalities, advocate for needed capital and operational funds that would help support the growing needs for intermunicipal transit service, particularly for growing smaller municipalities.

SECTION 9

OPERATING AND CAPITAL COSTS (SHORT TERM)

SHORT TERM OPERATING COSTS

An estimate was developed for the annual operating cost in 2008 dollars for the proposed short term intermunicipal transit services. Various techniques and assumptions were used to develop the costs based on existing practices and arrangements in the Region.

The intermunicipal transit Service Plan developed for the short term represents an increase, relative to 2008, of about 79,000 annual hours of intermunicipal transit service. The total new bus operating costs for the short term intermunicipal services are estimated to be about \$7.9 million. Annual revenue is projected to be about \$2.9 million, resulting in an average cost recovery of about thirty-seven percent. It is estimated that about 1.5 million new passengers would be attracted to the regional transit system. With transfers within Edmonton and suburban municipalities the actual number of new boardings could be significantly higher.

The foregoing operating costs were developed on the basis of an assumed average hourly operating cost of \$100 per hour. This is higher than the existing \$74 per hour cost in St. Albert, and the \$89 per hour cost of ETS, but allows for some higher costs for larger vehicles and potential fuel cost escalation.

Passenger demand has been estimated on the basis of current trends and an assumption that, in areas where new or expanded Park and Ride is available, ridership will grow slightly faster than the population. The average fare assumed for each of the new services was pegged at slightly higher than the current average fare, based on assumed fare increases over the next four years.

The development of regional Park and Ride sites will generate new operating costs, as well as potential for new revenue. By way of example, the City of Calgary is planning to charge \$3.00 per day for use of a Park and Ride space. With annual operating costs estimated at \$500 per space, a 1,000 space facility would cost about \$500,000 per year to operate. Assuming average revenue of \$2.00 per space, per weekday, such a facility would have a revenue potential of about \$500,000, which would be sufficient to cover costs. Following is a summary of the expected short term annual operating costs:

Short Term Annual Operating Cost of New Intermunicipal Bus Services

| | | |
|--------------------------------|-------------------------|-----------------------|
| New Intermunicipal Bus Service | 79,000 hours of service | \$7.9 million |
| Park and Ride Lots (4) | 3,500 stalls | \$1.8 million |
| Miscellaneous Costs | \$100,000 per lot | \$0.4 million |
| Total Operating Cost | | \$10.1 million |

SHORT TERM CAPITAL COSTS

The main capital costs items that can be expected over the short-term include new buses and light rail vehicles, new LRT extensions, new Park and Ride lots and a new fare collection system. The following table summarizes these capital costs, while sections that follow explain the underlying assumptions.

Short Term Capital Program

| | |
|---|-----------------------|
| New Buses (40) | \$ 26 million |
| Additional Garage Space (for 40 buses) | \$ 17 million |
| Park and Ride Lots (3,500 stalls) w/ Bus Transit Centre | \$ 63 million |
| NAIT Light Rail Transit Extension (incl. 10 vehicles) | \$ 825 million |
| Regional Fare Collection System (Smart Card) | \$ 25 million |
| Total Capital Cost | \$ 956 million |

Note: Land Costs are excluded from above figures

Short Term Bus Capital Costs

A total of forty new buses, including spares, would be required to operate all of the new regional services in the short term. This could include a mix of double-decker coaches, articulated buses, highway coaches and regular buses. The weighted average price of the new buses would be about \$640,000 for a total cost of about \$25,600,000. Although all forty vehicles will not be housed in the same facility the addition of forty buses to the regional fleet represents about 20 percent of the capacity of a typical ETS bus garage, or equivalent to the existing facility at St. Albert. The estimated cost of a 220 bus garage (12 metre equivalents) is about \$85 million so the forty bus addition to the regional fleet will cost approximately \$17 million in garage space, plus land costs.

Short Term Light Rail Transit Capital Costs

On the basis of the Plan outlined in this document, the only light rail extension that is foreseen to occur in the short-term is the extension of the LRT line from Churchill Station to NAIT. The City of Edmonton has estimated the capital cost of this extension to be in the range of \$825 million. Additional capital costs would be incurred for additional light rail vehicles. It is estimated that ten light rail vehicles would be needed to serve this extension, this is included in the capital cost above.

Short Term Park and Ride Lot Costs

In the short term it is assumed that four regional Park and Ride facilities would be developed. These would be located in Sherwood Park, St Albert, Edmonton (Lewis Estates) and Spruce Grove/Stony Plain and entail the construction of 3,500 new parking stalls. In addition, it has been assumed that bus transit centres would be needed at the three large sites. The four Park and Ride lots plus three transit centres are estimated to cost \$63 million.

Fare Collection System Cost

It is also assumed that in the short term a Region wide Smart Card fare payment system would be installed at an estimated cost of approximately \$25,000,000.

LONG TERM OPERATING COSTS

It is extremely difficult to project operating costs for the long-term, as these are highly dependent on growth and the extent of LRT extensions in place in the future. However, the expansion of the LRT would have a major impact on regional bus operating costs.

If LRT were extended outside Edmonton, it is estimated that St. Albert and Strathcona County would each be able to remove about 41,500 hours of intermunicipal bus service that existed in 2008 plus any additional service added between 2008 and the opening of an LRT extension to these municipalities. Similarly, the construction of a west LRT extension would allow Spruce Grove to reduce their existing and future bus hours by about fifty percent due to the shorter distance to the LRT terminus near Anthony Henday Drive and 87 Avenue.

LONG TERM CAPITAL COSTS

As with operating costs, capital costs in the long term are highly dependent on the extent of the Region-wide LRT network and concomitant reductions in bus service. Assuming that in the long term, there are LRT lines extended to Anthony Henday Drive along all currently contemplated corridors, the following order of magnitude capital costs can be expected:

| Long Term Capital Costs | |
|--|------------------------|
| Northeast LRT: Extension to Anthony Henday Drive | \$185 million |
| Northwest LRT: Extension from NAIT to Anthony Henday Drive | \$1,400 million |
| West LRT: Central area to west Edmonton (alignment to be determined) | \$1,700 million |
| South LRT: Century Park to Anthony Henday / 127 Street | \$525 million |
| Southeast LRT: Downtown to Anthony Henday Drive | \$2,125 million |
| East LRT: Downtown to Anthony Henday Drive | \$1,000 million |
| Park and Ride sites: at end of intermunicipal links | \$60 million |
| Total Capital Cost | \$6,995 million |

SECTION 10

RECOMMENDED PERFORMANCE MONITORING PROGRAM

PURPOSE OF PERFORMANCE MONITORING

The Capital Region Board will need to engage in the monitoring of the performance of the regional transit system to ensure that resources are being used efficiently and that services are being delivered effectively and equitably throughout the Region. The recommended performance monitoring program described herein is derived from the regional vision and principles for transit, as described in Section 3 of this Plan. It is designed to provide a quantitative method for measuring the performance of regional transit relative to the regional vision and principles.

The performance monitoring system is based on a hierarchical structure of objectives, criteria and targets (or guidelines). Care has been taken to identify objectives that can be easily quantified and indicators that can be objectively measured with existing or proposed data sources.

REGIONAL PERFORMANCE MONITORING PROGRAM

It is recommended that objectives and performance indicators be used as a means of evaluating transit service over a multiyear timeframe, as well as at a specific moment in time. The multiyear aspect allows decision-makers to look at trends, as well as current performance. The monitoring of transit performance provides a tool to annually assess the overall health of the regional public transit system.

The performance indicators will provide the Capital Region Board and transit operators with valuable information, including:

- Evaluation of regional transit system performance;
- Determination of whether sufficient funding is being provided to the regional transit system to meet the guidelines and targets;
- Indication of the need for Transit Priority Measures and, once implemented over time, how well they are performing in terms of improving transit performance;
- Assessment of regional efforts to better link transit and land use planning; and,
- Identification of deficiencies or service gaps which need to be addressed in future years.

Should the development of new transportation funding sources arise, the evaluation of transit service performance may enable the justification for the reprogramming of future funds for transit given the evaluation of actual quantitative performance data.

The performance indicators and guidelines have been tailored to fit the Urban, Suburban and Exurban Zones of the Capital Region. These zones are based on sub-regional areas that group similar geographic or demographic areas without reference to individual routes, services or transit operators. The objectives and indicators help provide clarity for decision-makers and the public regarding the level of transit service proposed to be provided regionally and assist individuals in making decisions on where to locate their residence, place of employment, choose a school or location for their business. The actual implementation and service design remain the responsibility of the operating agencies.

The passenger focused objectives, criteria and targets/guidelines will address cost recovery, productivity, ridership growth, access, comfort, convenience, reliability and service speed.

Figure 12 summarizes the objectives, indicators and targets. The section titled *Management Objectives, Indicators and Targets* provides more detailed elaboration.

Figure 12: Performance Objectives, Indicators and Targets

| Objective | Indicator | Potential Target |
|---------------------------|--|--|
| Cost Recovery | Percentage of operating cost recovered from fare revenue | 35 to 50 % |
| Rider Growth Rate | Percentage rate of growth in ridership | Should exceed population and employment growth rate |
| Productivity | Average percentage of seats occupied | 20 to 50% |
| Passenger Comfort | Density of standees per square metre | Varies by service type |
| Access to Transit Service | Distance of residents or jobs from transit service | Varies by service area |
| | Percentage of transit stops that are fully accessible | 95 percent |
| Passenger Convenience | Span of service (time frame) | Varies |
| | Service frequency | Minimum every 15 minutes; depends on service type and market |
| Reliability and Speed | Percentage of on-time departures/arrivals | Varies by service types and market; minimum 85 % |
| | Average transit operating speed | To maintain or improve operating speed |

MANAGEMENT OBJECTIVES, INDICATORS AND TARGETS

Cost Recovery

This objective seeks to maximize the farebox recovery rate to ensure fiscally responsible operations. The cost recovery objective provides an evaluation of the financial health of the systems and allows for comparison and benchmarking against other systems operating in similar conditions. The cost recovery indicator helps to determine the appropriateness of the fare structure and the ability of the system to generate ridership and revenue. The actual percentage targets would be determined and approved by the Regional Transit Committee and CRB. The guidelines or targets presented in this Plan are examples only, to show how targets may be expressed.

► **Objective:**

For each transit agency to operate in a fiscally responsible manner and maximize the farebox recovery ratio.

► **Indicator:**

Percentage of operating costs recovered from fare revenue.

► **Potential Target:**

| | |
|---------------------------|----------|
| Edmonton Transit | 45 – 50% |
| St. Albert Transit | 35 – 40% |
| Strathcona County Transit | 35 – 40% |
| Spruce Grove Transit | 35 – 40% |
| Fort Saskatchewan Transit | 35 – 40% |

Ridership Growth Rate

Ridership growth has traditionally been measured in absolute numbers or as per capita ridership. Although such measurements may be useful, a better indicator would be how transit ridership is performing relative to regional population growth, employment growth and vehicle registrations. The comparison against job growth is particularly important as more employment begins to shift to the Exurban Zone.

► **Objective:**

The ridership for each transit agency should grow faster than the rate of growth in population, jobs, and private vehicle registrations within their service area.

► **Indicator:**

Percentage rate of growth in transit ridership by operator.

► **Guideline:**

Ridership growth should exceed the growth rate of population and of employment by transit service area, and growth rate of vehicle registrations for the Region.

Productivity

This objective seeks to ensure that transit operators provide productive services that are also convenient and appropriate for the market being served. Productivity is a measure of how well products/services are being utilized by transit customers. In the case of regional transit, the major product (or service) being offered is available seat kilometres. Any means of measuring productivity should; therefore, evaluate how many of the available seat kilometres that are being supplied are actually being consumed by passengers. High productivity is an indication that a product is attractive to passengers, while low productivity suggests that passengers do not find the service attractive. Load factor or passenger kilometres divided by available seat kilometres, measures this productivity.

► **Objective:**

Operate transit services that are productive, convenient and appropriate for the markets being served.

► **Indicator:**

Average percentage of seats occupied (load factor or utilization).

► **Guideline:**

Varies by market, service type and time period; 20 to 50 percent.

Passenger Comfort Objective

This objective addresses the need to offer a level of comfort appropriate for the market being served. On urban services standing for short distances may be tolerated but it is not pleasant, whereas on long commuter routes people expect to enjoy a seat, preferably one that reclines or has a table or individual reading light. In general, one of the least welcome aspects of public transit is the need to stand on crowded, moving buses or trains during peak periods. Standing can be uncomfortable and is perceived by some passengers as being unsafe, particularly at freeway speeds. In extreme conditions, standing also may be the result of crowding that exceeds the comfort level in terms of personal space. People are not comfortable in an environment where they must stand shoulder to shoulder with complete strangers. As a result, most transit systems have policies that define the maximum capacity of bus and rail vehicles.

This objective sets guidelines for transit occupancy based on standee density using available floor space. The actual density targets would be determined and approved by the Capital Region Transit Committee. The guidelines or targets presented are examples only, to show how the targets may be expressed.

► **Objective:**

Occupancy on board vehicles in urban areas should be appropriate for the distance, speed, fare and type of service being operated.

► **Indicator:**

Density of standees per square metre of available standing area (regular service).

► **Guideline:**

- Intermunicipal commuter routes - no standees.
- 90 percent of routes should have standee densities of three persons/square metre or less.
- 95 percent of standing passengers on local and community services should not be required to stand for more than twenty minutes.

Access to Transit Service

Transit access can involve issues such as walking distance to a bus stop, and the provision of wheelchair lifts or ramps. The access objectives identify guidelines on how far people must walk or drive to access transit, as well as potentially linking transit accessibility to a new Land Use Policy for the Capital Region. The actual percentage guidelines would be determined and approved by the Capital Region Transit Committee. The guidelines or targets presented in this Plan are examples only, to show how the targets may be expressed.

► **Objective 1:**

Transit service in urban areas should be available within a comfortable walking distance of residents and jobs in urban areas.

► **Indicator:**

Distance of residents or jobs from a bus stop or rail station in urban/suburban areas.

► **Guideline:**

90 percent of residents and jobs to be within 400 metres of transit service.

► **Objective 2:**

Transit service in suburban/exurban areas should be within a reasonable distance from a Park and Ride facility with access to the transit network; transit services should be provided to areas with transit-oriented-development.

► **Indicator:**

Percent of suburban/exurban residences within a specific distance of a Park and Ride facility with rapid transit or commuter bus service.

► **Guideline:**

80 percent of residents in suburban areas should be within eight kilometres of a Park and Ride lot served by rapid transit or commuter services, and 70 percent of residents of exurban areas within 25 kilometres of a Park and Ride lot served by rapid transit or commuter services.

► **Indicator:**

Distance of residents or jobs from a bus stop or rail station in suburban areas.

► **Guideline:**

75 percent residents and jobs to be within 1.5 kilometres.

► **Objective 3:**

To provide fully accessible bus stops and transit stations.

► **Indicator:**

Percentage of bus stops and transit stations that are fully accessible.

► **Target:**

95 percent of bus stops and transit stations to be fully accessible.

Walking distance to a bus stop is one of the major determinants of transit usage. The closer a bus stop is to a person's point of origin or destination, the more likely they are to choose transit. Several research studies in the U.S. and Canada have shown that about half of all transit passengers walk less than 225 metres to a bus stop.

Many transit systems have guidelines or standards for walking distances between stops and residences, fewer systems have guidelines in place for walking distance between stops and destinations. The proposed guideline recognizes that employment is a major generator of transit trips. Focusing the guideline on employment reinforces the role of the transit system as supporting economic activity and access to jobs.

Passenger Convenience Objectives

Providing a transit system that is convenient for users and potential users is an important objective. Different levels of service are appropriate for different markets or zones. The actual percentage targets would be determined and approved by the Capital Region Transit Committee. The guidelines or targets presented in this Plan are examples only, to show how the targets may be expressed.

‣ **Objective 1:**

To provide an appropriate span of service to bus stops based on the zone designation.

‣ **Indicator:**

Percentage of stops provided with service within specified timeframes for each zone designation.

‣ **Guideline:**

Proportion of bus stop available over a specified period of time.

‣ **Objective 2:**

Provide transit service frequency appropriate for spontaneous travel on major corridors and convenient travel to all parts of the urban core.

‣ **Indicator:**

Minimum headways expressed in minutes.

‣ **Guideline:**

Varies by service type and market; minimum of fifteen minutes.

Reliability and Speed Objectives

Reliability and speed are very important to existing and prospective transit users. The actual percentage guidelines would be determined and approved by the Capital Region Transit Committee. The guidelines or targets presented in this Plan are examples only, to show how the targets may be expressed.

► **Objective 1:**

To operate transit services that are reliable, offer competitive travel times and adhere to published timetables or service intervals.

► **Indicator:**

Percentage of trips on-time at departure, arrivals and en-route timing points.

► **Guideline:**

Varies by transit market and transit service type; minimum of 85 percent of trips no later than five minutes; no early arrivals.

► **Objective 2:**

To maintain or improve existing average speeds on existing transit services within the geographical zones.

► **Indicator:**

Average transit operating speed in each zone.

► **Guideline:**

To maintain or improve the average fleet speed for the transit services in each geographic zone.

The reliability objective provides a link between the published timetables (promised service) and actual service operated on the road. Service reliability is a critical factor that influences people's modal choice.

The second objective is to ensure that transit services do not lose speed over the course of the evaluation period. Slower services cost more in operating expenses and are less attractive to passengers. It does become increasingly difficult to maintain service speed in face of growing traffic congestion; however, implementation of Transit Priority Measures can mitigate this problem.

SECTION 11

RECOMMENDATIONS

PLAN APPROVAL: BUILDING A FUTURE FOUNDED ON COLLABORATION AND CONSENSUS

This Capital Region Intermunicipal Transit Network Plan has been developed through an intensive process involving many individuals committed to serving in the very best interests of the municipalities they represent and in the broader interests of the Capital Region. The development of the Capital Region Intermunicipal Transit Network Plan has benefited from an extraordinary level of commitment from all who participated in its development. Moreover, the Plan and the process through which it was developed, demonstrates a remarkable level of goodwill, collaboration, cooperation and consensus between its authors. The resulting Transit Plan for the Capital Region will link all citizens of the Region in a manner that will enable them to reach their goals and aspirations with the help of a public transit system that is efficient, convenient and seamless.

The Capital Region Board urges the Government of Alberta to endorse this Plan without reservation, to advocate on its behalf to the Federal government, and to recognize its role in helping the Capital Region to achieve its economic, social, cultural and environmental goals. Support and approval of this Plan establishes a strong foundation for effective and coordinated transit services that will reap long term benefits to individuals, businesses and the whole region, in an increasingly competitive and borderless global economy.

THE ONGOING ROLE AND MANDATE OF THE CAPITAL REGION BOARD

This Capital Region Transit Plan is one of four regional plans (Land Use, Transit, GIS and Housing) that have been developed as part of the Capital Region Growth Plan in response to the Regulation. All four Plans were developed in tandem and in a coordinated fashion. None of these Plans could have evolved in the absence of the other and all of these Regional Plans contemplate an ongoing and even stronger linkage in the future, under the broad oversight of the Capital Region Board.

With particular reference to the Transit Plan, a new governance framework has been developed that identifies a new Regional Transit Committee (RTC) of the Capital Region Board that will be responsible for a variety of transit related functions relating to the planning and delivery of transit services in the Capital Region. A governance structure and decision-making framework for the RTC has been arrived at through collaboration and consensus between member municipalities.

The Provincial government is urged to support this governance model and to enact any necessary legislative and/or regulatory changes to support the implementation of this governance model.

QUICK WINS

This Capital Region Transit Network Plan has identified a number of “quick wins”, that is, transit initiatives and projects that are regionally beneficial and which can be implemented relatively quickly. These quick win projects have been identified as projects that are truly regional in their scope and breadth and around which there is broad consensus in the Capital Region.

AN URBAN TRANSIT SECTION WITHIN ALBERTA TRANSPORTATION

A new Urban Transit Section should be established within Alberta Transportation, with a mandate and responsibility for developing and programming transit supportive policies, programs and initiatives on the provincial highway network within Alberta’s two major urban regions, including the Capital Region.

THE MISSING LINK: A CAPITAL REGION ROADWAY PLAN

There are three key elements that underpin the growth and development of a metropolitan region such as the Capital Region:

- A Land Use Plan
- A Transit Plan
- A Roadway Plan

In order for growth and development to occur in an orderly, effective and productive fashion, all three elements need to have a common strategic direction. The Capital Region Board Regulation did not include a mandate to develop a regional roadway plan.

While the Provincial government has through its Working Together Report developed a ten-Year and 35 Roadway Plan, these have not been refreshed or updated to reflect new realities and significantly different policy directions being pursued by several municipalities in the Capital Region. The Capital Region is currently undergoing a significant paradigm shift in terms of how transportation demands are being met. A number of municipalities in the Capital Region are experiencing unprecedented demands for transit service. Municipalities that have service are looking to expand it while those without service are actively exploring new service.

The Provincial government is strongly urged to develop a Capital Region Roadway Plan that reflects the new and emerging realities in the Region and one which complements the Land Use and Transit Plans completed by the Capital Region Board. A new Capital Region Roadway Plan needs to address the following specific objectives:

- Support the objectives of the Capital Region Growth Plan and its constituent plans.
- Follow the lead of other provincial and state highway departments who have adopted progressive highway and roadway planning and design strategies that enable a significantly stronger role for transit in the Region's transportation network.
- Revise highway planning and design standards that accommodate a wide variety of transit-friendly features to enhance transit operation on intermunicipal highways and roadways in the Capital Region. These include:
 - Exclusive Bus Lanes and HOV Lanes;
 - Bus-on-shoulder operations;
 - Transit Priority Signals;
 - Transit Queue Jumps; and,
 - Park and Ride lot accesses.
- Avoid highway investments that compete with and/or diminish the effectiveness of the Land Use Plan and transit infrastructure investments.

PUBLIC TRANSIT IN CONTEXT WITH OTHER PUBLIC POLICY ISSUES

The Government of Alberta has recently undertaken new policy initiatives aimed at updating its Energy Strategy and policies relating to reduction of Greenhouse Gas (GHG) emissions.

The emergence of this Capital Region Transit Plan is very timely, as it strongly supports the energy and greenhouse gas emissions policies being pursued by the Provincial government. In particular, the Plan provides opportunities for public transit to perform more effectively and efficiently in meeting people's daily transportation needs in the Capital Region by providing a viable alternative to private single-occupant automobile travel.

With a more effective and more heavily used regional transit system, the Region will consume less energy, emit fewer greenhouse gases, emit fewer pollutants and contributes to a greater state of health and well-being.

In addition, there are opportunities for the Provincial government to integrate public transit service policy and delivery with social and healthcare programs as they relate to transportation of persons with disabilities.

DIALOGUE ON FUNDING

The emergence of public transit as a more significant mode of transportation in the Capital Region raises the fundamental issue of municipal financial capacity. As the Region continues to grow, so does the need for public transit investment. Traditionally, municipalities have benefited from provincial and federal grant programs that have allowed them to invest in transit assets. However, the same cannot be said of operating funds.

At present, Alberta municipalities receive no transit operating funds from the Province and are severely challenged to fund ongoing operations from a very narrow pool of funding sources. There are numerous jurisdictions in North America which receive capital and operating funds from higher orders of government. There are also Canadian and American precedents for municipalities being given access to a wide range of funding mechanisms that current Alberta legislation does not permit.

In order to leverage the significant benefits of a truly regional transit system, it is recommended that the Provincial government consider providing new stable and ongoing operating funds to municipalities where demand can support local and/or intermunicipal transit service. In the same vein, Provincial government is encouraged to explore alternative funding models in Canada and elsewhere in an effort to broaden the range of funding sources that can be made available for municipal, and in particular, regional transit service in the Capital Region.

COST ALLOCATION

There is currently no mechanism for benefiting municipalities to share costs associated with the delivery of intermunicipal transit services. On December 15, 2008, the Provincial government set the expectation that the Capital Region Board will develop one or more formulas that would apply to any municipal portion of operating and capital costs for regional transit. The Province is encouraged to provide a clear understanding of the new ongoing funding arrangement, as noted in *Dialogue on Funding* above, and to provide a clear framework for development of regional transit cost allocation formulas.

“GREENTRIP” FUNDING PROGRAM

The Provincial government’s recently announced “GreenTRIP” funding initiative appears to be very closely aligned with the new Capital Region Transit Plan and its “quick wins”, in particular. The Capital Region Board urges the Provincial government to finalize the details of the “GreenTRIP” Program as the Capital Region is ready to respond positively to this program in a regionally beneficial and coordinated fashion.

GLOSSARY

Accessible Transit Fleet

A fleet of vehicles that are readily accessible for mobility restricted passengers by providing low floor buses that can “kneel” to reduce the height of the first step, retractable ramps for wheelchair access, etc.

Alberta’s Industrial Heartland

A major processing centre for the petroleum, petrochemical and chemical industries located in Strathcona County, City of Fort Saskatchewan, Sturgeon County and Lamont County.

Bus Lanes

Traffic lanes designated for exclusive use by buses.

Concession fares

Transit fares charged to a particular set of transit patrons that is below the standard fare (e.g., student and senior fares).

Corridor

A passageway or route, such as a major utility, roadway and transit route through an area.

Cost Recovery

The extent of recovering costs by charging fees for service, such as transit service.

Customer Information System

An integrated system to provide information to customers, such as bus routes, bus stop locations, scheduling, fares etc.

DATS

Disabled **A**dult **T**ransit **S**ystem provided by the City of Edmonton for exclusive use of eligible mobility restricted persons.

Disabled

A person with disabilities which may involve physical impairment, sensory impairment, cognitive or intellectual impairment mental disorder or various types of chronic diseases.

ETS

Edmonton Transit System.

Eligibility and Certification Criteria

Formal procedure established by municipalities to identify persons eligible to use specialized transit services. These may include age, mobility requirements, medical certificate, etc.

Exurban Zone

In a metropolitan area, it is often physically detached from the main city and involves stretches of travel with little or no ridership capture.

Farebox Recovery

Is the ratio of funds collected by a transit authority relative to the full cost of service provided. Typically, the farebox recovery rate is less than 50% compared to the overall operating costs of providing public transit service.

Fare System

The method employed by a transit authority to collect fares from the transit ridership. It includes the actual charge per trip plus method of payment – i.e. cash, monthly pass, student pass, seniors pass, etc., as well as the equipment used to collect the fare.

Fleet mix

The mixture of transit vehicle types used by a transit authority. This could include low floor buses, highway coaches, handibuses, articulated buses, double-decker buses, specialized handicapped buses, etc.

Governance

The process of decision-making and the process by which these decisions are implemented.

“GreenTRIP” Program

A \$2 billion provincial government grant program encouraging the implementation of innovative transit initiatives that reduce greenhouse gases.

HOV Lanes (High-occupancy vehicles)

Exclusive traffic lanes designed for vehicles that carry a prescribed minimum number of passengers (2 to 3).

Intermodal transfer

Transfer between different modes of travel.

Intermunicipal Transit Service (ITS)

Transit services that operate between municipalities, or across municipal boundaries.

Kiss and Ride

Mode of travel by transit when passenger is driven to/from a transit station by another person.

LRT Terminal Station

The station located at the end of an LRT line.

Light Rail Transit

A transit mode using electrically powered rail vehicles operating in one to five car trains. The rails can be on exclusive right-of-way or incorporated into the road right-of-way.

Local Transit Service

Services that operate primarily within the boundaries of one municipality.

Park and Ride

Mode of travel whereby a person drives to/from a transit station, parks the vehicle in the station parking lot and then uses the transit service.

Potential Land Use Scenarios

Alternate – A possible combination and distribution of land uses in an area that differs from current trends.

Trend – Projection of population and employment for municipalities in the Capital Region according to current trends.

Public Transit

Mass transportation services that are owned and operated by, or on behalf of, public sector entities.

Queue Jumps

Physical measures provided at signalized intersections to permit transit vehicles to proceed first through the intersection. This could include an exclusive bus lane in advance of the intersection and an advance “transit” light allowing the bus to proceed first before the rest of the vehicles.

Radial

A radial pattern is one that appears to radiate from a central point, similar to the spokes of a hub of a wheel like bus/transit routes coming into the centre of a city.

Regional Brand Identity of Intermunicipal Services

Establishment of a symbol, or slogan, for the Regional Intermunicipal Transit Service whereby potential regional transit riders can readily identify the Intermunicipal Transit Service.

Roadway Plan

A plan prepared by the roadway authority which identifies existing and future roadway plans.

Rural Zone

Rural areas are typically sparsely settled areas that cannot support regular transit service.

StAT

St. Albert Transit.

SCAT

Strathcona County Accessible Transportation provides senior citizens and persons with disabilities transportation service within Sherwood Park, rural Strathcona and to pre-determined destinations in the City of Edmonton.

Signal Priority

Traffic light that permits a transit bus to proceed thru the intersection before regular traffic has a green light.

Specialized Transit

For a segment of the population that has mobility restrictions that make it difficult or impossible to take conventional transit service, specialized services are typically equipped to accommodate persons with physical disabilities.

Suburban Zone

Development surrounding the urban core is typically characterized by lower density of development. In the Capital Region, it includes St. Albert, Sherwood Park as well as more outlying neighbourhoods within Edmonton (e.g., Summerside, Blackmud etc.).

Transfer Location

A location where transit passengers have to change vehicles to continue their trip.

Transit Centre

A location, often including a shelter, where numerous bus routes meet to facilitate transfer between buses.

Transit markets

An area or population that has characteristics that lend themselves to good transit service and transit use.

Transit-Oriented Development (TOD)

Refers to intensified development around transit stations with progressively lower density development spreading outwards from the centre. TOD creates attractive, livable and compact neighbourhoods with housing, jobs, shopping, community services and recreational opportunities all within convenient walking distance of a node.

Transit Priority Measures

Measure taken to reduce the travel time by buses and to get around traffic congestion. Measures could include exclusive bus lanes, advance traffic light to jump the queue, remote traffic light control, etc.

U-Pass

The Universal Transit Pass provides eligible students with unlimited access to regular Edmonton, St. Albert and Strathcona County transit services from September to April.

Urban Zone

The mature and highly developed urban core of a municipality.

APPENDIX A: SUMMARY OF STAKEHOLDER WORKSHOPS

INTERMUNICIPAL TRANSIT NETWORK VISION WORKSHOP

(September 5, 2008)

Consultation Purpose

OBJECTIVES

- To build consensus among the Public Transit Committee on a common vision for the Regional Transit Plan
- To identify key values and principles that would form the framework for the plan
- To identify considerations in evaluating future transportation options
- To identify potential goals for the plan

PERSPECTIVES EXPLORED:

- Transit riders, decision-makers, taxpayers, planners, local system operators

Consultation Participants

- Public Transit Committee Members and one administrative or elected representative from each of twenty-five member municipalities invited to participate. Participants that registered included:
 - Mayor Nolan Crouse (St. Albert)
 - Mayor Rob Wiedeman (Parkland County)
 - Councillor Carrie Fischer (Redwater)
 - Councillor Ed Gibbons (Edmonton)
 - Mayor Greg Krischke (Leduc)
 - Mayor Bill Nimmo (Gibbons)
 - Alderman Randy Palivoda (Spruce Grove)
 - Councillor Mary-Ann McDonald (Leduc County)
 - Councillor Peter Wlodarczak (Strathcona County)
 - Councillor Dan Sekora – Alternate (Calmar)
 - Phil Newman (Leduc County)

- Douglas Mills (Edmonton)
- Chris Cambridge (Fort Saskatchewan)
- Josh Pyrcz (Leduc)
- David Hales (Spruce Grove)
- Ian Sankey (St. Albert)
- Rob McGowan (Parkland County)
- Matt Carpenter (Strathcona County)
- Terry Cashin (Sturgeon County)
- Earla Wager (Bon Accord)
- Mayor Anita Fisher (Devon)
- Corey Levassuer (Beaumont)
- Capital Region Board Chair & Staff
- ISL Engineering and Land Services Staff and Consulting Team

Workshop Approach— “Café Process”

- › **Round 1** – Participants randomly distributed and rotate through each of six stations and asked to note initial thoughts on the given topic.
- › **Plenary** – “Common Themes” identified and shared with the group.
- › **Round 2** – “Consolidation” Participants return to the station that is of greatest interest and help summarize content on flip charts.
- › **Round 3** – “Critical Review” Participants move through other 5 stations. One person (host) remains to share summary/receive comments.
- › **Plenary Reports “Reporting”** – Hosts will report their summary to the group with Q&A. (5 minutes per station).
- › **Condensation “Use It or Loose it”** – Areas of agreement recorded. Areas needing further discussion are assigned to later in the process.

Vision

“The Region’s transit network enables the Capital Region to achieve its economic, social, and environmental objectives by making transit a convenient and competitive mode of transportation”

Approved Vision, Principles and Operational Values in the report (Section 3 of this Plan)

INTERVIEWS - KEY GOVERNANCE CONSIDERATION

(September and October 2008)

Consultation Purpose

Consult with a subset of municipal stakeholders to understand the current situation and gain insights that only leaders in the region delivering, contracting and negotiating for transit services can provide.

Explore the diverse range of decision-making and policy issues and challenges, potential governance models, operating structures and approaches to designing and delivering intermunicipal transit.

Identify potential and compatible models in advance of undertaking best practices research, and development of recommendations for Committee.

Consultation Participants

Operating Transit

City of St. Albert

- Nolan Crouse (Mayor)
- Bill Holtby (CAO)
- Dez Liggett (Director, Transit)
- Charlotte St. Dennis (Legal Services)

City of Edmonton

- Stephen Mandel (Mayor)
- Bob Boutilier (GM Transportation)
- Greg Heaton (Project Manager, Regional Growth Initiatives)
- Charlie Stolte (Branch Manager, Transit)
- Brian Latte (Branch Manager, Transportation Planning)

Strathcona County

- Cathy Olesen (Mayor)
- Peter Wlodarczak (Councillor)
- Robyn Singleton (CAO)
- David Turner (Associate Commissioner, Regional Growth Initiatives)
- Matt Carpenter (Manager, Transit)

Contracting Transit

City of Spruce Grove

- Doug Lagore (CAO)
- David Hales (General Manager, Planning)

Fort Saskatchewan:

- Chris Chambers (General Manager, Planning)

Aspiring - Transit

City of Leduc

- Paul Benedetto (CAO)
- Josh Pyrcz (Program Manager)

Leduc County

- Mary-Ann McDonald (Councillor)
- Doug Wright (CAO)
- Rick Stuckenberg (Director of Planning)

CRB

- Chris Sheard (Interim Chair)
- Kathleen LeClair (Chief Officer)

Learnings: Key Transit Governance Functions

- Long-Range Planning
- Advocacy: Transit, Funding
- Customer Information and Branding
- Fare System
- Service Policies
- Routes and Schedules
- Vehicle Acquisition and Transit Infrastructure Construction
- Operations and Maintenance

REGIONAL TRANSIT GOVERNANCE WORKSHOP 1

Workshop #1(October 31, 2008):

Objective: Regional Responsibilities by Function

- Transit Function Definition
- Small Group Activity # 1
 - Summary & Discussion
- Break
- Small Group Activity # 2
 - Summary & Discussion
- Next Steps & Wrap-up

Consultation Participants

- All Public Transit Committee Members
- Other Staff Participants
 - David Hales (Spruce Grove)
 - Shannon Sortland (Parkland County)
 - Tracey Melnyk (Parkland County)
 - Matt Carpenter (Strathcona County)
 - Charles Stolte (City of Edmonton)
 - Douglas Mills (City of Edmonton)
 - David Turner (Strathcona County)
 - Dez Liggett (St. Albert)
 - Bob McDonald (St. Albert)
 - Chris Sheard (Interim Chair; CRB)
 - Kathleen LeClair (Chief Officer, CRB)
 - Peter Tarnawsky (CRB - Transit)
 - Sharon Shuya (CRB - GIS & Housing)
 - Andy Haden (CRB - Land Use)
 - Curtis Gillespie (CRB - Writer)
 - Hassan Shaheen (ISL Engineering)
 - Scott Baker (AECOM Consult)
 - Mark Schofield (AECOM Consult)

Workshop Process

Group Activity # 1

- Break up into 3 groups:
- Random groupings, except St. Albert, Edmonton, Strathcona not in same group

Group Activity # 2

- Break up into 3 groups:
- Group 1: St. Albert, Edmonton, Strathcona
- Group 2: Contracted Transit Services and near-term adopters of transit service
- Group 3: Low likelihood of need for regional transit

Summary of Results - Workshop 1

| Responsibility | LRT | Intermunicipal Bus | Local Bus |
|---------------------------------|-----|--------------------|-----------|
| Long-Range Planning | R | R | L |
| Funding Advocacy | | R | R |
| Customer Information & Branding | | R/L | R/L |
| Fare Collection System | | | |
| Fare Policy | | | |
| Service Policy | | | |
| Routes and Schedules | | | |
| Vehicle Acquisition | | | |
| Construction | | R | |
| Operations & Maintenance | | | |

R – Primarily Regional Responsibility; L – Primarily Local Responsibility; R/L – Shared Responsibility

- Consensus that LRT should be regionally planned and operated
- Consensus for regional fare collection system
- Consensus for regional branding/customer information
 - Significant support for continuing local identity within regional system
 - “Star Alliance” airline model
- Consensus for municipal role in *local* service planning/service policy

REGIONAL TRANSIT GOVERNANCE WORKSHOP 2

Workshop #2 (November 6, 2008):

Objective: Pursue definition of regional governance model

- Focus on areas where consensus is absent
- Presentation of alternative governance models
- Application of Peer Cities research
- Application of Stakeholder feedback
- Discussion with Committee
- Trade-offs
- Direction on shortlist of options

Consultation Participants

- All Public Transit Committee Members
- Other Staff Participants
 - David Hales (Spruce Grove)
 - Shannon Sortland (Parkland County)
 - Tracey Melnyk (Parkland County)
 - Matt Carpenter (Strathcona County)
 - Charles Stolte (City of Edmonton)
 - Douglas Mills (City of Edmonton)
 - David Turner (Strathcona County)
 - Dez Liggett (St. Albert)
 - Bob McDonald (St. Albert)
 - Chris Sheard (Interim Chair, CRB)
 - Kathleen LeClair (Chief Officer, CRB)
 - Peter Tarnawsky (CRB - Transit)
 - Sharon Shuya (CRB - GIS & Housing)
 - Andy Haden (CRB - Land Use)
 - Curtis Gillespie (CRB - Writer)
 - Hassan Shaheen (ISL Engineering)
 - Scott Baker (AECOM Consult)
 - Mark Schofield (AECOM Consult)

Key Issue

- Policy, planning, and operation of intermunicipal bus service:
 - Local lead options
 - Local intermunicipal policy set in light of regional policies
 - Local policy set within regional guidelines
 - Regional lead options
 - Regional routes and schedules subject to local approval
 - Local review and comment on regional plans

Alternatives

- › Three configurations for consideration:
 - a. Independent entity for LRT and bus coordination
 - b. Independent entity for LRT & intermunicipal bus
 - c. CRB transit board for transit operations

Option A: Independent Entity for Bus Coordination and LRT

| Responsibility | LRT | Intermunicipal Bus | Local Bus |
|------------------------------------|-----|--------------------|-----------|
| Long-Range Planning | | R | L |
| Funding Advocacy | | R | R |
| Customer Information & Branding | | R/L | R/L |
| Fare Collection System | | R | R |
| Fare Policy | R | 2 | 1 |
| Service Policy | | 2 | 1 |
| Routes and Schedules | | 2 | 1 |
| Vehicle Acquisition | | 2 | 1 |
| Construction | | R | 1 |
| Operations & Maintenance | | 2 | 1 |
| Specialized Services (Paratransit) | n/a | 2 | 1 |

R – Primarily Regional Responsibility; L – Primarily Local Responsibility; R/L – Shared Responsibility; 1,2,3 or 4 – Local vs. Regional Lead Option

A. Independent Entity: LRT & Bus Coordination

- › LRT Planning and integration of intermunicipal bus plans from municipal operators
- › Participates in coordinated regional transit planning in cooperation with CRB land use planning
- › Provides regional customer information and branding in agreement with municipal bus operators
- › Coordinates intermunicipal specialized services
- › Constructs LRT system including LRT Park and Rides
- › Operates and maintains LRT system
- › Governed by representative board

Option B: Independent Entity for LRT and Intermunicipal Bus

| Responsibility | LRT | Intermunicipal Bus | Local Bus |
|------------------------------------|-----|--------------------|-----------|
| Long-Range Planning | | R | L |
| Funding Advocacy | | R | R |
| Customer Information & Branding | | R/L | R/L |
| Fare Collection System | | R | R |
| Fare Policy | R | 4 | 2 |
| Service Policy | | 3 | 2 |
| Routes and Schedules | | 3 | 2 |
| Vehicle Acquisition | | 4 | 2 |
| Construction | | R | 2 |
| Operations & Maintenance | | 3 | 1 |
| Specialized Services (Paratransit) | n/a | 3 | 2 |

R – Primarily Regional Responsibility; L – Primarily Local Responsibility; R/L – Shared Responsibility; 1,2,3 or 4 – Local vs. Regional Lead Option

B. Independent Entity LRT & Intermunicipal Bus

- Long-Range Planning coordinated with Land Use
- Service and fare policies set based on funding availability
- Determines eligibility for specialized services based on municipal policies and coordinates intermunicipal specialized services
- Coordinates routes and schedules with municipal transit
- Constructs LRT and Park and Rides, acquires vehicles
- Delivers LRT and intermunicipal bus service
- Governed by representative board

Option C: CRB Transit Board for All Transit Operations

| Responsibility | LRT | Intermunicipal Bus | Local Bus |
|------------------------------------|-----|--------------------|-----------|
| Long-Range Planning | | R | L |
| Funding Advocacy | | R | R |
| Customer Information & Branding | | R/L | R/L |
| Fare Collection System | | R | R |
| Fare Policy | R | 4 | 4 |
| Service Policy | | 4 | 4 |
| Routes and Schedules | | 4 | 3 |
| Vehicle Acquisition | | 4 | 4 |
| Construction | | R | 3 |
| Operations & Maintenance | | 4 | 4 |
| Specialized Services (Paretransit) | n/a | 4 | 3 |

R – Primarily Regional Responsibility; L – Primarily Local Responsibility; R/L – Shared Responsibility; 1,2,3 or 4 – Local vs. Regional Lead Option

C. CRB Transit Board for All Transit Operations

- LRT and bus planning
 - Integrated with Land Use planning
 - Input from municipalities
- Establishes service policies based on funding availability
- Establishes routes and schedules, subject to municipal approval of local service
- Constructs LRT, Park and Rides, and acquires vehicles
- Operates and maintains transit service, including specialized service
- Governed by representative transit board and CRB

RESULTS OF GROUP ACTIVITY

Transit Operator Group: Draft

Group: Operator
Indicate if responsibility should be regional with an R (blank indicates it remains local)

| Responsibility | LRT | Inter-municipal Bus | Local Bus | Comments |
|--------------------------------------|-----|---------------------|-----------|----------|
| Long Range Planning | | | | |
| Funding Advocacy | | | | |
| Customer Information and Branding | | | | |
| Fare System | | | | |
| Service Policy | | | | |
| Routes and Schedules | | | | |
| Vehicle Acquisition and Construction | | | | |
| Operations and Maintenance | | | | |

Contracting and Near Term Transit Group: Draft

Round Two - Group Contracting and Near Term Transit
Indicate if responsibility should be regional with an R (blank indicates it remains local)

| Responsibility | LRT | Inter-municipal Bus | Local Bus | Comments |
|--------------------------------------|---------------------|---------------------|-----------|---|
| Long Range Planning | | R | L | OTHER PRESENT |
| Funding Advocacy | R | R | R | |
| Customer Information and Branding | R | R | R | STATE JURISDICTION |
| Fare System | NEIGHBORHOOD POLICY | R | L | LOCAL ZONES (SEE) |
| Service Policy | R | R | L | INTER-CITY (LONG TRIP) HIGHWAY BUS INTERURBAN FLEET |
| Routes and Schedules | R | R | L | |
| Vehicle Acquisition and Construction | R | R | L | ONE-RIDE - REGIONAL |
| Operations and Maintenance | | R | L | |

MOST EFFECTIVE ?

Long Term Transit Prospects Group: Draft

Round Two - Group Long Term Transit Prospects
Indicate if responsibility should be regional with an R (blank indicates it remains local)

| Responsibility | LRT | Inter-municipal Bus | Local Bus | Comments |
|--------------------------------------|-----|---------------------|-----------|----------|
| Long Range Planning | | | | |
| Funding Advocacy | R | R | R | |
| Customer Information and Branding | | | | |
| Fare System | R | R | | |
| Service Policy | | | | |
| Routes and Schedules | | | | |
| Vehicle Acquisition and Construction | | | | |
| Operations and Maintenance | | | | |

Recommended Next Steps

- Additional issues to follow from configurations:
 - Service policy based on local funding subject to local approval, or based on new dedicated funding with regional consultation
 - Definition of composition of governing board
 - Transition plans
- Service policy based on funding availability
 - If funding is property tax at municipality's discretion, municipality may dictate service and recovery ratio policies
 - Costs incurred by a regional transit entity can be allocated based on stations, route miles, vehicle miles, trips to or from, or jurisdiction of rider residence
 - Policies for service funded by dedicated regional transit funding set by the transit board limited by the amount of funding available

Next Steps

- Definition of composition of governing board
 - Representation of only current funding sources and customers
 - Number of members or weighted voting can reflect entities of differing size
 - Avoid majority control by one entity
 - Appointed citizens or elected officials
 - Regional Service Commission members have been municipal Councillors
- Transition plans
 - Begin with customer information, branding or other non-operating functions
 - Consult in advance with employee representatives
 - Transfer of functions coordinated with employees and current employers' policies
 - Transfer of use of assets may substitute for transfer of title of assets

ADMINISTRATIVE WORKSHOP – SPECIALIZED TRANSIT

(December 18, 2008)

Workshop Summary

- Two workshops held
- Workshop Objectives:
 - Validate data / profile of existing specialized transit services
 - Discussion of key issues & challenges
 - Review of alternate administrative /operations models
 - Review evaluation framework
 - Dialogue a preferred approach - “A way forward...”

Consultation Participants

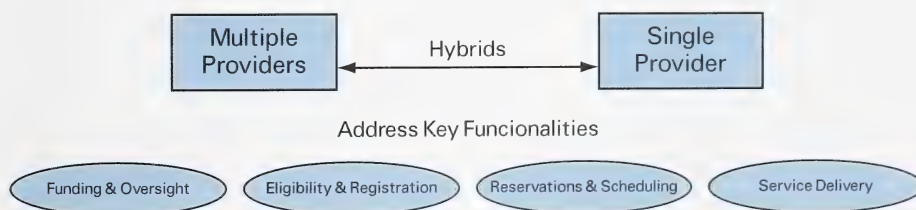
- City of Edmonton
 - Lorna Stewart
 - Miju Damodar
- Strathcona County
 - Matt Carpenter
 - Dana Sims
- City of Ft. Saskatchewan
 - Gail Steeves
- City of Leduc
 - Donna Brock
- City of St. Albert
 - Bob McDonald
 - Dez Liggett
- Town of Devon
 - Cheryl Baxter
- Spruce Grove
 - Regrets: Bonnie Foster
- Spruce Grove
 - Regrets: Kim Neil

Learnings: Key Challenges & Opportunities

- › Regional approach – urban/rural
 - Recognition that member municipalities fund the level of service determined appropriate for their service area (and residents)
 - “costs follow the user”
 - Need to reflect local autonomy (administration, operations & service delivery)
 - Opportunities for regional coordination (intermunicipal travel)
- › Need for standardization of eligibility/certification, operating policies and procedures, etc.
 - Including need to eliminate trip purpose restrictions
- › Need to provide comparable level of service: conventional and specialized
 - Days of week, hours of day, service area, etc.
- › Fiscal responsibility and accountability – Need to be cost effective
- › Specialized transit – “lifeline” service in rural areas
- › Collaborative opportunities – funding/cost-sharing with health care community
 - provision of access to health services (non-emergency medical transport)
- › Ensure reflect local political sensitivities
- › Expanded use of taxis to supplement specialized transit van/bus service
 - Recognize need for regulation of vehicle-for-hire industry – with few exceptions, not regulated throughout the region
- › Opportunities for accessible conventional transit to meet mobility needs – current & future
 - Incentives and policies address demand /mobility management opportunities

Alternative Delivery Models

Many possible models to deliver specialized transit



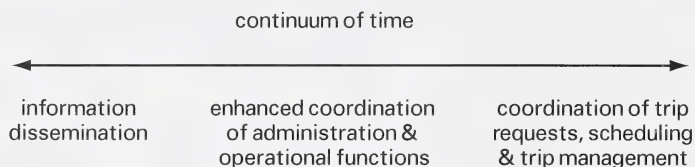
Mobility Vision: A Way Forward...

To Address:

- **Universal access** – including accessible infrastructure.
- **Flexible mobility options** with a cost-effective mix of accessible shared-ride, public transportation services. (Level of service comparable to that afforded the general population)
- **Maximize the utility and investment** in accessible fixed route transit (mobility management strategies) to encourage a shift from specialized to conventional public transit.

A Way Forward

- Compatible with CRB recommended governance structure – Regional Transit Committee (RTC) vs. local municipalities
- RTC assume mobility management functions (for intermunicipal specialized transit trips) – evolutionary process:



- Intermunicipal specialized transit - level of service comparable to that of transit for general public
- Opportunities for joint use of vehicles in small urban and rural areas of Region

Need to:

- Standardize eligibility and certification processes
 - Move to focus on functional disability (build on current DATS eligibility & SCAT initiatives)
 - Reciprocal recognition of service eligibility (populate respective client databases)
- Standardize policies and procedures
 - Advance booking requirements
 - Subscription rules
 - Elimination of trip purpose restrictions
 - Fares
- Expanded use of taxis to supplement specialized transit van/bus service
 - Region-wide performance based contracts
- Develop regional (specialized transit) technology plan
 - Opportunities for enhanced coordination/communication regional trip scheduling & trip management

APPENDIX B: PEER CITIES' REVIEW

| | | CANADA | | | |
|---------------------------|--------------------------------|--|---|---|---|
| | | Edmonton, AB | Calgary, AB | Toronto, ON | Vancouver, BC |
| Context | Regional Transit Institutions | Edmonton Transit System (ETS) is accountable to the City Council for operating bus and light rail transit services. The Transportation and Public Works Committee, comprised of four Councilors, addresses transportation issues in Edmonton. Edmonton provides some contract service outside its boundaries, while the neighboring communities of Strathcona County and St. Albert operate independent bus systems focused on commuter service into Edmonton. | Calgary Transit (CT) operates a comprehensive, integrated transit network within The City of Calgary, consisting of LRT, regular bus and community shuttle service. Major strategic decisions regarding transit service are approved by Calgary City Council through a Standing Policy Committee on Land Use Planning and Transportation. | Toronto Transit Commission (TTC) provides bus, streetcar, and rapid transit service within the City of Toronto. GO Transit, a provincial crown agency, provides regional rail and bus service across the Greater Toronto Area. Other municipalities provide their own local bus services. The new Metrolinx regional authority is responsible for coordination, planning, and financing across the region, centralized procurement, and implementing the Presto Card. In the future, Metrolinx will take over operating responsibilities from GO Transit. | The South Coast British Columbia Transportation Authority ("TransLink") is governed by a 9-member Board of Directors appointed by the 21-member Mayor's Council and is one of only three authorities worldwide responsible for both a road and transit network. TransLink provides bus, rail, and ferry services across the greater Vancouver area. |
| | Operating Funding Sources | ETS: 40-45% from fares Remainder from property taxes | CT: Fares: 49% Advertising: 6% Municipal Taxes: 45% | TTC: Fares: 67% Municipal Taxes: 29% Other Operating Revenue: 4% GO Transit: Fares: 90% Province: 10% | Fares: 37% Motor Fuel Tax: 30% Property Tax: 28% Parking Sales and Site Tax: 4% Other: 2% |
| | New Transit Initiatives | Current South LRT line being extended. A number of LRT lines are in planning | Four LRT expansion projects planned between now and 2013. | "Transit City" LRT initiative from TTC - 120 km of new service at cost of \$6.1 billion. "The Big Move" draft regional plan released by Metrolinx. \$50 billion expansion of public transit over 25 year, though funding not identified yet. | Canada Line, Trolleybus Purchases, Diesel Bus Purchases |
| Regional Indicators | Urbanized Area Size | 699 sq. km. (270 sq. mi.) (City) 9,531 sq. km. (3,680 sq. mi.) (CMA) | 848 sq. km. (327 sq. mi.) | 1,749 sq. km. (675.3 sq. mi.) | 2,000 sq. km. (773 sq. mi.) |
| | Urbanized Area Population | 752,412 (City) (1,076 sq. km.) 1.0 million (CMA) (105 per sq. km.) | 1,019,900 (2007) (1,202 per sq. km.) | 4.8 million (2006) (2,718 per sq. km.) | 2.2 million (2007) (1,100 per sq. km.) |
| | Annual Regional Transit Trips | 62 million (79 per person - 2007 estimated) | 90.3 million (89 per person) (2007) | 459.8 million (2007) | 173 million (2007) (77 per person) |
| Responsibilities & Powers | Major Fixed Route Operations | ETS, Strathcona County, St. Albert | Calgary Transit | TTC, GO Transit, Brampton, Durham, Mississauga, Milton, Oakville | TransLink |
| | Funding Receipt and Allocation | City Council Transportation and Public Works Committee | City Council | City Councils for municipal providers; Metrolinx may eventually control a dedicated funding source | TransLink and subsidiaries |
| | Long-Range Planning | City Council Planning and Development | Calgary City Council has decision making authority for land use and transport planning within city. No formal regional planning structure; however, a regional land use and transit plan is currently being developed by the Calgary Regional Partnership | City of Toronto | TransLink and subsidiary staff |

| | Edmonton, AB | | Calgary, AB | CANADA | | Toronto, ON | Vancouver, BC |
|---|----------------------------------|---|---|---|--|---|---------------|
| | Name(s) | ETS | N/A | TTC | | TransLink | |
| Regional Transit Organization of Interest | Creation | Began in 1908 with the Edmonton Radial Railway 21km streetcar system | N/A | In 1925, TTC undertook to integrate the various street railway services then in operation. | | Established in 1998 to plan, fund, manage and operate an integrated transportation system in the Greater Vancouver region. Its authority was modified in 2007 to allow for service expansion beyond the Metro Vancouver boundaries. | |
| | Selection of Governing Board | ETS Transit System Advisory Board reports to Transportation and Public Works Committee. The Board is made up of citizens and provides advice to the City Council. The Transportation and Public Works Committee is comprised of four City Councillors. | N/A | The TTC is owned and operated by the City of Toronto and is overseen by nine City Councillors who make up the Commission Board. Members are appointed by the City Council. | | Mayor's Council on Regional Transportation appoints TransLink Board of Directors. | |
| | Coverage Area | City of Edmonton | Across Calgary | City of Toronto and parts of Greater Toronto Area | | Metro Vancouver | |
| Paratransit for Persons with Disabilities | Description | Shared-rider, door-to-door public transportation service for 16 yrs or older who cannot use regular transit for all trips because of a physical or cognitive disability; Supported by a tax levy | Shared-ride public transportation service for people who are unable to use buses or LRT due to a disability or disabling health condition. | Wheel-Trans: door-to-door accessible service for the physically disabled. Also serves the airport and boundary transfer points to co-ordinate with other accessible door-to-door providers. | | HandyDART provides shared-ride services for people with physical or cognitive disabilities who cannot use conventional services | |
| | Specialized Services | Reservation trips are for occasional or casual trips. Reservation trips must be booked 2 or 3 days in advance. May also book "Subscription" trips that from the same origin to the same destination, at the same time and on the same day of each week. | Access Calgary is responsible for the scheduling and dispatching of your trip requests. | TTC also offers five "community bus" routes to reduce the dependence of the mobility-challenged on Wheel Trans. Serves senior-oriented residences and destinations. | | Passengers may telephone their local HandyDART operator to request a trip. HandyDART passengers are picked up at the outside door of their residence and dropped off at the outside door of their destination. | |
| | How Service is Provided | Wheelchair lift equipped vehicles, sedans, minivans and passenger vans | Access Calgary was formed in the spring of 2001 in order to integrate transportation services that had been provided separately through Calgary Handi-Bus and Special Needs Taxi. Access Calgary delivers transportation services through partnerships with Calgary Handi-Bus and taxi companies. Service is provided on Calgary Handi-Bus buses, accessible taxis (retrofitted vans), sedans and minivans. | Rides are reserved one day in advance, by calling the reservation line. Service is provided by accessible buses and contracted accessible private sedans and taxis. | | Trips can be booked up to a week in advance and customers can eventually qualify for recurring trips if needed. Priority is given to trips for work, post-secondary school or medical purposes if demand exceeds supply. Services are generally offered between 6:30am and 7:00pm on weekdays. There are currently eight contracted operators serving the TransLink service area. | |
| | Eligibility Criteria | Based on degree of disability, e.g. use a wheelchair, scooter, age, or have limited mobility | | Anyone who cannot use the conventional transit service due to physical or cognitive disabilities | | Anyone who cannot use the conventional transit service due to physical or cognitive disabilities | |
| | Fare Policy | Equivalent to adult bus and LRT fares | Equivalent to Regular Calgary Transit fares | Regular TTC fares apply. | | Cash fares are \$2.50 within one zone and between adjacent zones, \$3.75 between three adjacent zones and \$5.00 between four adjacent zones. Discounted fares are available through the purchase of 10-ticket FareSaver booklets. Concession fares are available to passengers with a HandyPass. Qualified passengers can also get taxi-saver coupons that allow them to take a taxi for half the price. | |
| | Annual Operating Costs (FY 2007) | N/A | Net Operating Budget (2007) \$25,770,000 | \$74 million (2008) | | \$27.6 Million 2007 Annual Report | |
| | Annual Passenger Trips FY 2007/1 | 835000 | 1.0 million | 2.0 million | | 1.3 Million 2007 Annual Report | |

UNITED STATES

| | San Francisco, CA | Portland, OR | Minneapolis, MN | Melbourne |
|---------------------|---|---|--|--|
| Context | <p>Regional Transit Institutions</p> <p>San Francisco Bay Area Rapid Transit (BART) provides regional heavy rail service across the San Francisco Bay Area, while Caltrain operates commuter rail between San Francisco and San Jose. Muni provides bus and LRT service in San Francisco, AC Transit provides bus service in Oakland, and there are over a dozen smaller municipal bus operators. The Metropolitan Transportation Commission (MTC) serves as the regional long-range planning body and distributes state and federal funds, while also overseeing regional toll bridge revenues.</p> | <p>Tri-County Metropolitan Transportation District of Oregon (TriMet) provides bus and LRT services across the Portland region. Tri-Met also operates the Portland Streetcar under contract to the City of Portland and will be initiating new Westside commuter rail service in 2009. Tri-Met is governed by a Board of Directors appointed by the State Governor.</p> | <p>The Metropolitan Council is the regional planning agency serving the seven-county area. The Council operates bus and LRT public transportation through Metro Transit. The Met Council members are appointed by the State Governor. Some jurisdictions have chosen to "opt out" of Metro Transit and provide their own bus services.</p> | <p>Train, tram and bus service contract with the State Government. Connex operates suburban Trams operates the trams, and companies operate various including the metropolitan. The Public Transport Division management role. MetLink brand for all public transport Melbourne. It is co-owned by Yarra Trams. MetLink has a State Government to handle functions including market information.</p> |
| | <p>Operating Funding Sources</p> <p>Farebox recovery varies widely depending on the services offered (BART: 50%; Caltrain: 40%; Muni: 27%)</p> <p>BART supported by dedicated sales tax, most others by property taxes</p> | <p>Fares: 21%</p> <p>Dedicated Payroll and Other Taxes: 57%</p> <p>State/Federal Grants: 14%</p> <p>Other Operating Sources: 8%</p> | <p>Dedicated State Motor Vehicle Sales Tax and Other State Taxes: 60%</p> <p>Fares: 35%</p> <p>Other Sources: 5%</p> | <p>Similar to Brisbane - fare recovering operating subsidy from the State</p> |
| | <p>New Transit Initiatives</p> <p>Major extension south to San Jose if funded by Santa Clara County</p> | <p>I-205/Portland Mall MAX Light Rail Project, Washington County Commuter Rail, Portland-Milwaukie Light Rail, Portland Streetcar Loop, Columbia River Crossing Highway and Transit Bridge</p> | <p>Hiawatha LRT, Central Corridor LRT, Northstar commuter rail project</p> | <p>SmartBus will provide a new town bus services to connect centers. TramTRACKER enabled to call or text a remote tram for arrival info.</p> |
| Regional Indicators | <p>Urbanized Area Size</p> <p>11,857 sq. km. (7,368 sq. mi.)</p> | <p>1,228 sq. km. (474 sq. mi.)</p> | <p>2,315 sq. km. (894 sq. mi.)</p> | <p>8,806 sq. km. (3,400 sq. mi.)</p> |
| | <p>Urbanized Area Population</p> <p>764,076 (City) (6,324 per sq. km. City) 7.3 million (Urbanized Area) (612 per sq. km.) (2007)</p> | <p>2.2 million (1,759 per sq. km.)</p> | <p>2.4 million (1,037 per sq. km.)</p> | <p>3.8 million (432 per sq. km.)</p> |
| | <p>Annual Regional Transit Trips</p> <p>422 million</p> | <p>108 million (68 per person)</p> | <p>75 million (31 per person)</p> | <p>Typically carries over 1 million day. In 2004-05, 381 million carried on metropolitan transit services.</p> |
| | <p>Major Fixed Route Operations</p> <p>BART, Caltrain, Muni, AC Transit, and 16 others</p> | <p>TriMet and South Metro Area Regional Transit (SMART)</p> | <p>Metro Transit (operating division of Met Council) (light rail and bus) and "Opt Out" authorities and cities</p> | <p>Buses: 25 contract operated metropolitan bus services and rural bus services.</p> |

Regional Transit Organization of Interest

Paratransit for Persons with Disabilities

| UNITED STATES | | | AUSTRALIA | | |
|------------------------------------|--|--|---|---|---|
| | San Francisco, CA | Portland, OR | Minneapolis, MN | Melbourne, VIC | Brisbane, QLD |
| Name(s) | BART | TriMet | Metropolitan Council (Met Council) | MetLink | TransLink Transit Authority |
| Creation | BART and its sales tax were created in 1962 by referendum. Muni was historic private operator acquired by City of San Francisco. | Streetcar service replaced by bus in 1930s. TriMet created in 1969 through Oregon Bill 1808. A payroll tax was also adopted in 1969. | Private transit provision ended 1970. Met Council formed in 1967, strengthened by legislative action three successive times. | The Public Transport Division was established in 1998 (as the Office of the Director of Public Transport) as the Victorian Government agency responsible for public transport services. The Division's functions include: contract management, performance monitoring, planning, safety, ticketing. | The TTA is an initiative of the Queensland Government to meet the public transport needs of SEQ. It was established in July 2008 under the Transport Operations (TransLink Transit Authority) Act 2008. The role of the TTA is to lead and deliver an integrated public transport system. The TTA is responsible for integrating and improving the key elements of the public transport system in SEQ which includes: services, ticketing, infrastructure and information. |
| Selection of Governing Board | The 9 BART Board members are directly elected from 9 districts | TriMet is governed by a 7-member Board of directors, appointed by the Governor. They represent and must live in certain geographical districts. The Board sets agency policy, enacts legislation (taxing and ordinances relating to police ordinances), and reviews certain contracts. | Governor appoints 17 members - 16 geographic districts, one at-large | The Department of Transport supports two Ministers and their portfolio areas: Lynne Kosky MP, Minister for Public Transport; Tim Pallas MP, Minister for Roads and Ports. The Department also provides support to the Parliamentary Secretaries: Rob Hudson MP, Parliamentary Secretary for Public Transport and Arts; Martin Pakula MLC, Parliamentary Secretary for Roads and Ports | The TransLink Transit Authority Board is comprised of seven members including the chairperson. Board members were selected based on their knowledge or experience in at least one of the following areas: consumer interests; transport coordination and operational planning; public transport network planning; representative of public transport employee interests; law; accounting; economics; social policy; customer relations and/or commercial and marketing development. |
| Coverage Area | San Francisco and the East Bay cities and suburbs of Contra Costa and Alameda counties | Boundary is 3/4 of a mile beyond the outermost portions of TriMet's Bus and MAX lines. Does not serve locations outside the TriMet District. | 7-county Twin Cities metropolitan area that includes Minneapolis and St Paul | Separate services for persons with disabilities are not offered as part of the public transportation system | Separate services for persons with disabilities are not offered as part of the public transportation system |
| Description | BART provides ADA paratransit service to eligible individuals whose disability prevents them from accessing, boarding, or riding BART trains. Service is generally by reservation only | Shared-ride public transportation service for people who are unable to use buses or LRT due to a disability or disabling health condition | Transports certified riders who cannot use fixed route service due to disability or health condition | N/A | N/A |
| Specialized Services | Service is according to ADA requirements | Provide information on transportation choices, personal trip planning, and assistance learning to ride regular buses and MAX trains; Provides shuttles to grocery stores, neighborhoods, and medical services. | 3 types: 1) Riders can reserve a trip up to four days in advance, minimum of 2 hrs in advance; Can have "standing orders" for regularly scheduled trips; 2) Premium Same Day service for emergency trips; 3) Emergency taxi trips for last-minute emergencies | N/A | N/A |
| How Service is Provided | Service is provided in conjunction with overlapping fixed route systems (Muni and AC Transit) by a number of lift van and taxi operators. | Fleet of small buses, sedans, and taxicabs | Contracts with the following public, private and non-profit transportation providers to provide services | N/A | N/A |
| Eligibility Criteria | ADA eligible | Temporary, Conditional, or Full service; based on degree of disability, e.g. use a wheelchair, scooter, age, or have limited mobility | Complete a questionnaire; Metro Mobility staff determine eligibility, if eligibility cannot be determined, health professional to verify eligibility. | N/A | N/A |
| Fare Policy | No more than twice the BART fare | Reduced fare for those that qualify; Must show qualifying ID | \$2.30 Standard \$3.50 Peak Hr; Fares cover one-way trips that are shared with other riders; Premium Same Day fares are \$7, Metro Mobility pays remainder up to \$20; 2 Assured Ride Coupons eligible for rides on last minute emergency taxi service - value up to \$25 | N/A | N/A |
| Annual Operating Costs (FY 2007) | N/A | \$29.0 million | \$29.7 million | N/A | N/A |
| Annual Passenger Trips (FY 2007/1) | N/A | 1.1million | 1.2 million | N/A | N/A |

APPENDIX C: EXISTING SPECIALIZED TRANSIT SERVICES

EXISTING SPECIALIZED TRANSPORTATION SERVICES

| Community | Service Type | Eligibility | Advance Booking | Days of Week/ Hours of Operation | Fares | Operating Costs (annual) | No. of Vehicles | No. of Trips | Local Taxi |
|-------------------|--|---|-----------------------------------|--|---|-----------------------------|---|--|------------|
| Edmonton | Demand Responsive | Seniors & Disabled; pre-reg. req'd | 10 days; min 18 hrs. | M-F: 6:00AM – 11:00PM SAT: 6:30AM – Midnight SUN: 6:30AM – 11:00PM | Cash: \$2.50 Tickets: \$ 2.10 Monthly Pass: \$58 | \$23 million | 91 accessible buses 74 non-accessible cars | 870,000 per yr. | Yes |
| St. Albert | HandiBus & Dial-a-ride | Seniors & Disabled; pre-reg. req'd. | Yes; 1 day | 7:30AM – 5:30PM | | \$137,000 | – | 7300 per yr. + 500 on taxi | Yes - 1 |
| Strathcona County | Demand Responsive | Seniors & Disabled; pre-reg. req'd | Yes; 48hrs | M-F: 6:00AM – 10:00PM To/Fr. Edmonton: M-F: 6:00AM-6:00PM | \$283,000 | 4 accessible buses | 13,200 per yr | | |
| Fort Saskatchewan | Taxi Voucher Program | Seniors & Disabled | | | \$3 + 1 voucher | | N/A | | Yes |
| Spruce Grove | Dial-a-ride | Seniors & Disabled; pre-registration req'd. | Yes; priority to medical trips | Mon. – Fri.; 8:00AM – 4:00PM | One-way trips: Spruce Grove - \$3 Stony Plain - \$5 Devon - \$22 Edmonton - \$30 rtn. | | 1-20 pass bus 2 minivans | | |
| Stony Plain | | Seniors and disabled; priority to medical trips | | Office: M,W,F 9:00AM – 11:30AM | One-way trips: Stony Plain - \$4 Spruce Grove - \$8 Devon - \$32 Edmonton - \$28-\$32 Multi-trip passes available | \$60,000 | 1-10 pass bus 1-5pass van | 169 trips /mo. | |
| Leduc | Dial-a-ride | Seniors & Disabled | Yes | Mon-Fri.; 9:00AM-5:00PM | \$3.25 | | | | Yes - 4 |
| Devon | Dial-a-ride. Schedule daily excursions | All residents | | Mondays, Tuesdays, Thursdays; hours vary by day | Round trip in town - \$3; Leduc & Spruce Grove - \$6; Edmonton or equivalent \$10 | | 3-20 seat vans | Weekly average of 25 to 50; up to 75-90 during popular periods | Yes - 2 |
| Calmar | Scheduled monthly excursions; also available for group excursions | Seniors and disabled | No | Every 2nd and 4th Thursday to Leduc; First Wednesday of month to W.E.M. | | \$3,000 | 1-18 seat van | 6-18 to W.E.M; 4-5 per excursion to Leduc | No |

APPENDIX D:

BLUE RIBBON PANEL REPORT

Capital Regional Board – Transit Governance and other issues
 Comments by Al Cormier – Member of Blue Ribbon Panel
 November 19, 2008

General Comments

1. Congratulations to the Capital Region Board, to the Transit Committee, to staff and to the consultants for:

Recognizing the need to address the issue of inter-regional transit and the many related issues.

Organizing well prepared documents explaining the issues, local conditions and the options under consideration.

Recognizing that this is a complex matter and that while lessons from other jurisdictions are valuable, ultimately, the adopted recommendations have to reflect the realities of the existing situation in the Capital Region.

2. For sharing this information with the Panel in a timely and professional manner.

Background considerations:

3. Governance is the most important aspect in the provision of inter-municipal transit services. Without appropriate governance, policy decisions are often not made correctly and can be difficult to implement.
4. For disabled persons– standard eligibility criteria will be required throughout the CRB as inter-municipal services become available. The inter-municipal services will have to be fully accessible.
5. The organization of inter-municipal services should minimize transfers from one operator to another.
6. Transit friendly land use begins with pedestrian friendly land use, particularly allowing for sidewalk connectivity. .. Spruce Grove example – sidewalk connectivity
7. Current land use patterns will only support so much transit.
8. Governance options can be implemented in stages and evolve from one model to another as needs dictate.
9. There should be a discussion on how funding will flow from province or federal government. Through CRB or directly to the municipalities.
10. The local freeway system has contributed to urban sprawl that now exists but can now be used to advantage for express bus transit services
11. Quebec Inter Municipal Transit Corporations (IMTC) options (explained below in Activity type 1) are possible in the following corridor examples:
 - Leduc County, Leduc - Edmonton
 - Stoney Plain, Spruce Grove - Edmonton
 - Morinville, St Albert – Edmonton
 - Redwater, Fort Saskatchewan – Edmonton

12. No need for similar service levels throughout the CRB area. Plan for what the municipalities can afford.
13. Caution about fuel tax as a source of revenues to fund transit. With the coming of hybrid vehicles, plug in hybrids and all electric vehicles, gasoline consumption could decrease by at least 30 to 50% in about 10 to 15 years.
14. That Capital Region Board decisions must reflect 75% of the population is a good check point but it depends on how the Edmonton representative(s) view a proposal.
15. Ask the Province to extend gasoline tax to all municipalities in the CRB area that contribute financially to public transit services
16. Governance model can evolve. Start with Transit Committee reporting to CRB.
17. Take advantage of expertise in ETS in the planning, design and operation of high order transit services such as LRT. A regional responsibility does not require a regional takeover of daily operations. There are good examples in the Montreal and Toronto region where high order transit lines (subways) extend into neighbouring municipalities and the main municipality maintains control over operations and responds to the service levels needed in the adjoining municipality.
18. Governance Option 2 is a committee reporting to the CRB. Since committees by themselves are not 'legal entities' I read that to mean that the CRB will be ultimately responsible.
19. A Commission for Regional Transit not reporting to the CRB sounds messy in accountability, despite cross memberships.
20. Not all 25 members of CRB need to get involved in providing transit. Those that do should be on the Transit Committee.

Consider early actions whereby CRB is initially involved in inter-municipal bus services only through a Transit Committee. More responsibilities can be added later.

Activity type 1

Quebec style Inter Municipal Transit Corporations (IMTC) in the following corridor examples:

- Leduc County, Leduc - Edmonton
- Stoney Plain, Spruce Grove - Edmonton
- Morinville, St Albert – Edmonton
- Redwater, Fort Saskatchewan – Edmonton

An IMTC is formed by municipalities along a transportation corridor that form a corporation for the purpose of delivering transit services along that corridor. Example of how it could work:

- Stoney Plain and Spruce Grove get together and form a corporation for transit purposes.
- Corporation is governed by a small Board named by the two municipalities.
- The two municipalities become eligible for share of provincial gas tax revenues.
- The corporation decides on the level of transit services it wants to purchase from either an existing public transit provider or a private bus company and enters in a contract for specified services. Best to leave it to the contractor to supply the buses.
- The corporation sets the level of service to be delivered and the fares to be collected.
- The net cost of the contract is shared by the two municipalities on the basis of the service km's operated in each. The municipalities fund their share of the net costs using gas tax revenues, transportation grants or general property tax revenues.
- The CRB assists the corporation in planning, monitoring and marketing activities as well as the contract development and monitoring.

Same can be applied in other corridors. This leaves service level and related funding decisions to the local governments.

Activity Type 2

- CRB sets up a unit with appropriate staff to deal with inter-municipal transit matters.
- Transit Committee provides policy guidance and directions to the staff. Transit Committee is appointed by the CRB Board and the Committee membership reflects the municipalities involved in funding transit.
- Responsibilities of the unit initially include services to the municipalities offering inter-municipal transit services such as: service planning and monitoring as well as contract design and monitoring.
- Unit is also responsible for marketing and public information on all transit services in the CRB area. This would start with inter-municipal services and grow to include all services, including local.
- Unit is also responsible for setting up and operating Smart Card fare system for all transit services in the CRB area.

Activities that can be placed on back burner for now.

- Operating the LRT. Since the LRT is strictly within the City of Edmonton at this time, this is best left in ETS' hands that have the expertise in this area.
- If LRT ever extends beyond Edmonton city limits, its operation should still be done by ETS with local governments and/or CRB assuming the net costs beyond the city limits. Make sure there is a track switch at the city limits so that some trains can be short-turned at the border, leaving the neighboring municipality to buy the train frequency they can afford. Capital costs for LRT extensions should be a CRB responsibility.

Answers to the questions posed to the Blue Ribbon Panel

- What are the strengths (or benefits) of the alternative governance options?
 - They provide a venue to address inter-municipal transportation matters
 - They show a willingness to address these matters.
- What are the weaknesses (or risks) of the alternative governance options?
 - They do not seem to allow for staging of responsibilities to be assumed by the new organization.
 - The options transfer to CRB a need for expertise in design and operation of transit services (i.e. LRT) they do not have or could not acquire quickly.
- What implementation challenges may the capital region face choosing one option or the other?
 - Both call for the same wide range of responsibilities and do not offer any staging options.
 - Assuming responsibilities for items such as LRT design and operation.
 - Staffing the necessary transit unit within CRB.
- What have we missed?
 - No staging of options. i.e. start small
 - Quebec type CIT's (Corporation Intermunicipale de transport – Intermunicipal transit corporation)
 - Discussion on options for the flow of funding from provincial and federal governments
 - Discussions on funding from local governments (net operating costs, capital costs or both)
 - Discussions on funding from the province for inter-municipal transit services
 - Discussion of future of gas tax as we move to electrified transport.
 - Funding mechanisms for LRT extensions outside of Edmonton (not an early need)
- Does one model better suit the unique situation facing the capital region?
 - The Committee model - under CRB - is best suited for initial stages.
- What suggestions do you have to improve the alternatives we are considering?
 - CRB assumes overall responsibility for planning, branding and integrated public information.
 - CRB provides a level of transit expertise to the local governments involved in inter-municipal transit.
 - Local municipalities decide how much inter-municipal transit services they can afford, with the assistance of CRB.

- What do you see as the 1 – 3 factors that should guide the governance decision?
 - Start slowly
 - Leave LRT operation in the hands of ETS
 - Local governments decide on their level of inter- transit services.
- What suggestions can you make regarding board composition for either governance option?
 - Committee has no legal status and is in effect a CRB function
 - Committee option only need to involve representatives from municipalities involved in financially supporting inter-municipal transit services + plus other municipalities with transit, especially if CRB assumes public information responsibilities.
 - Any considerations or suggestion regarding voting structure?
 - Need to deal with how Edmonton votes (1 vote or more than 1) If 75% of population is required, Edmonton virtually has a veto on all decisions.
 - Any considerations or suggestions regarding allocation of costs?
 - Yes, to the benefiting municipalities on a per km of bus service formula
 - Any other considerations
- What organizational structures will be required to enable the alternative governance options?
 - A small 'transit unit' within CRB led a professional with experience in this field.
- What insights can you provide into managing the transition?
 - Start small – CIT type operations, and overall regional planning.

Land Use Policies and Objectives:

- Objectives are good
- Transit friendly land use starts with pedestrian friendly designs
- Has the Regional Capital Board any power over land use?
- Scenario Development B makes most sense – development nodes along major transportation/transit corridors (except delete transportation)
- Use infill and brownfield developments
- Should allow for a resident to live without owning an automobile
- Have we missed any major policy areas that can be addressed at the municipal or regional level?
 - Yes, the expertise needed on CRB staff.
- What kind of more specific policies would support the effective implementation of inter-municipal transit?
 - See above comments
- Are you familiar with any jurisdictions that have implemented “best practices” policies?
- What support should the region request from industry?
 - Involve employers in subsidizing transit for their employees.
- What support should the region request from the provincial and federal orders of government?
 - Seek federal support for Income Tax Act amendment. This proposal is under consideration by the Federal Government at this time and support from CRB would be meaningful.
 - Seek provincial dollars for inter-municipal transit - i.e. gas tax

Preliminary Table of Context:

- Do you see any missing pieces that will ensure an effective and supported Plan?
 - Staging options
 - Funding options
 - Flow of funding from province and federal gov’t
 - Keeping LRT expertise in ETS, at least for a while.

November 20, 2008

To: Public Transit Committee Members
Capital Region Planning Board

From: Dr. Anthony Perl, Member
Blue Ribbon Panel

Re: Evaluation of draft materials on transit vision, governance and planning

I am pleased to provide this input to help guide your examination of transportation options for Alberta's capital region. I regret that I will be unable to join the teleconference on November 21, as I will literally be in the air between Calgary and Edmonton during that time, and then making a presentation to Travel Alberta in Edmonton during that interval. Air travel and teleconferences do not work in harmony, alas. I have blocked January 23 for our face-to-face meeting in Edmonton, and look forward to a more interactive engagement at that time.

Let me begin by sharing my thoughts about effective transit governance, in light of the vision and the options that you have identified. I believe that vision statements can set the terms by which organizations succeed or fall short, and I am concerned about the use of the term 'competitive' in the draft vision statement that was recommended in September. The intent may have been to suggest that transit would be competitive with the automobile, but the history of transit governance in North America over the last 50 years has been filled with examples of inter-jurisdictional competition among transit agencies for public funding and other resources.

I think that your vision statement should be amended to include the term 'integrated' alongside the terms 'convenient' and 'competitive' to underscore the goal of having a transit system spanning the Capital region that is managed and operated as a single network, with as much (or more) common purpose than is found in the region's road system. Otherwise, the vision statement might be used to justify counterproductive competition among transit operating entities, or municipal governments within the capital region.

Turing to the options for organizing future public transportation in the capital region, I would suggest that the CRB Transit Committee could offer greater potential for achieving success than the Regional Services Commission for LRT and Inter-municipal bus. I suggest this because my experience with public transit policy and management around the world suggests that there are two broad approaches to developing public transport, and one of these can often yield greater achievements in providing effective and sustainable mobility. Each of these two understandings is represented in the Committee and the Commission options. The Committee option would enable developing public transit to serve broader ends of environmental sustainability, social equity and economic development. The Commission option would focus attention and effort on transit development as an end in itself

I would suggest that the ‘golden age’ of North American public transit occurred from roughly 1900 through 1925 and was characterized by policies and management that identified the success of transit not as an end in itself, but rather as a contributor to the profitable land development and electric utility services offered the companies providing transit. This same spirit of using transit as a tool for economic and social development has been carefully nurtured in the more effective contemporary public transit operations perhaps most notably in Portland, Oregon – one of the transit agency peer comparisons that has been identified for your consideration. Appreciating the value that transit creates through more compact and diverse regional land use can lead to strategies in which transit investments are both welcomed and effectively managed by local communities in a region. The Committee governance structure for future transit development in the Capital region offers a good opportunity to directly link transit and land use and to more fully integrate transit planning into the regional development efforts that will intensify under the Capital Region Board. To the extent that the Board succeeds in implementing the vision of a regional growth and development strategy, public transit that is run as a committee of the Board will be positioned to make the greatest contribution to that effort.

Public transport can also be pursued as a service that delivers mobility an end in itself. This corresponds more closely to the Commission model that has been identified. Here, the terms of success are measured by mobility inputs and outputs. These include: travel volume (passenger-kilometres; trips); occupancy (passenger-kilometres per vehicle kilometer or vehicle hours of service); operating efficiency (cost-to-revenue ratio – aka fare box recovery, employees per million passenger kilometers; mean distance between in-service vehicle failures). Transit commissions were often established after the public-private partnership model of transit governance embodied in the original streetcar franchises established across North America broke down and public transit became an unprofitable ‘ward of the state’. There are many public transit commissions that deliver transit service successfully across North America, if success is measured in carrying a subset of the local travel efficiently and safely in return for public subsidy. These commissions focus carefully on their outputs and deliver reliable service within the parameters that are set by their authorizing jurisdiction.

Transit commissions are ‘policy takers’ not policy makers in that they follow the lead of city councils, county boards, or even state transportation agencies in different cases in providing service that they are asked, and paid, to deliver. Give them more money and they will run more buses and trains. Give them less money, and they will run fewer buses and trains. But these commissions are rarely successful in influencing urban and regional growth strategies through transit-oriented development because they are far removed from the land use planning and development activity where such synergies could occur. In a region where the land use is either well established or already favours public transit, the commission model can work to deliver the best transit services possible. But in Alberta’s capital region, land use appears quite dynamic with the potential for transit-oriented development initiatives.

It is worth noting that the advantages of the committee governance option would depend on the Capital Region Board's prospects for establishing itself as a credible steward of the region's future. I see nothing in the Board's design of the intent of the provincial government that gives me any qualms about the CRB's playing such a stewardship role effectively well into the future. But provincial government agendas could shift and were this to happen, the CRB's development of regional planning and policy could be affected. If the CRB's mandate was to change, or its legitimacy was to become compromised, then the committee governance option could be undermined relative to a stand-alone commission. But changing political agendas can also affect independent commissions, through the change in their funding levels.

When it comes to specific land use policies and arrangements, I would like to draw attention to a tension between the stated goal of transit-oriented development and the repeated mention of park-and-ride as the principal land use around major stations to be developed in the system. Hank Dittmar and Gloria Ohland have written a book entitled *The new transit town - Best practices in transit-oriented development*, published by Island Press in 2004. I would highly recommend that the committee members and consultants take a look at this resource. It is the most accessible, logical and clearly presented consideration of how New Urbanist designs can be applied to transit system development. The book identifies the need to bring residential and commercial land uses right up to, and even into, transit stations rather than surrounding these facilities with parking.

The history of auto-oriented transit system development has been very mixed at best. BART, the heavy rail transit rail network serving the San Francisco Bay Area was held back in its success for decades because of less than ideal station design both in the city of San Francisco (where using mid-block station entrances to save money impaired the ability to do joint development with office towers on major street corners) and in suburban locations where residential and commercial development was severely restricted by the hectares of surface parking that was constructed for autos.

Not only does transit-oriented development offer the opportunity to develop 'free' light rail stations by generating capital investment of equal or greater value than the cost of building the station, the people who will live and work adjacent to the station will generate more trips – especially off peak trips, compared to stations designed around a park and ride lot. BART's experience demonstrated that all the parking spaces which could be built within an acceptable walking distance of suburban transit stations would fill by 8:30 a.m. on weekdays. This meant that almost nobody boarded BART's trains operating through these suburban stations between 8:30 a.m. and 3:30 p.m. because with full parking lots, there was no way for passengers to get to these stations, since almost nobody lived or worked around them. The result was poor off-peak ridership and higher operating deficits than if BART's suburban stations had people living and working around them.

The land adjacent to future rail transit stations in the Capital region will become some of the most valuable land in Edmonton's suburbs – it if is developed in a way that people can walk to and from the trains. This is because during the planning horizon for the capital region's transit development, the world will have entered a carbon constrained future in which motor vehicle fuels will have become very expensive, or scarce, or both. Richard Gilbert and I have co-authored *Transport Revolutions: Moving People and Freight Without Oil* (published by Earthscan, 2008) which offers extensive documentation of how world oil production is likely to peak in the coming decade, quite possibly by 2012. The International Energy Agency's 2008 World Energy Outlook forecasts oil production to climb from 86 million barrels a day in 2008 to 106 million barrels a day in 2030, but only if \$350 billion a year (totaling \$8.4 trillion) is invested in producing this mostly unconventional oil.

Without such massive investment in oil production, a decline in global production will arrive sooner, as conventional reserves are already in decline everywhere except possibly in Saudi Arabia. And even if oil continues to flow in reasonable quantities through the coming decade, there is a growing likelihood that carbon caps will be established for global climate protection. This would provide another constraint on the cost and availability of automotive fuels. In *Transport Revolutions*, we make the case for electricity as the only energy carrier that will be capable of blending enough different energy sources to keep society moving at levels that we have been accustomed to. Electric cars will be a part of the future, but electric buses and trains are proven technology already moving hundreds of millions of people around the world every day. City-regions that have such infrastructure in place and under development will fare much better in the carbon constrained future that lies ahead.

This energy future has significant implications for the capital region's transportation and land use plan. It would be a great mistake to develop transit with the assumption that motor vehicle use will continue to be fueled by cheap and available liquid hydrocarbons. The time and money needed to retrofit the existing built environment will be considerable, but there is no sense in adding to either by building a transit system that is based mainly around auto travel. I would encourage the consultants to build a \$200 a barrel oil assumption into both auto and transit demand forecasts for 2030, and ensure they are designing a regional system that can accommodate such a future. This lack of mention about energy and climate change is the principal omission in the subjects included in your plan's table of contents.

I would be happy to communicate further on any of these matters, or other queries that might arise from Friday's teleconference. I am sure that these deliberations will be productive.

To: Peter Tarnawsky, Manager – Regional Projects, Capital Region Board
 From: Glen Leicester, Principal, Shirocca Consulting
 Date: November 20, 2008
 Subject: “Blue Ribbon Panel Review”

The following represents a high level review of the Capital Region Board’s report on Governance Models, Land Use Policies and Objectives and the Draft Table of Contents. As requested most of my effort has focused on the alternative Governance models put forward by the consultants. I have organized each section to respond first to the questions provided, and second to provide for broader commentary.

A. Governance Models

Two preferred options were developed by the consultants for consideration. They included:

- Option 1 – Regional Services Commission for LRT and Inter-municipal Bus; and,
- Option 2 - Capital Regional Board Transit Committee for All Transit Services.

The questions presented and a response to each is as follows:

1. What are the strengths (or benefits) of the alternative governance options?

Option #1:

- Less disruption to existing structures and employees and easier transition;
- Commission is a single purpose transit company, arms length from CRB; and,
- CRB remains strategic planning and policy organization without operations responsibility.

Option #2:

- Single agency responsible for all transit services, with no overlap, duplication or confused accountability;
- Ensures that planning, financing and operating transit is delivered in a way that best supports the region’s growth management plan;
- Offers best chance for securing new source of funding for transit (e.g. regional gas tax); and,
- Easily expandable as region grows.

2. What are the weaknesses (or risks) of the alternative governance options?

Option #1:

- Multiple organizations responsible for planning, policy and operation of transit services in the region would be more challenging to align to support regional growth plan;
- Inevitable duplication of services, competition for funding and confused accountability;
- Challenging to expand as new areas would have options in how to deliver local services; and,
- Transfer of LRT operations may be resisted by existing employees and union(s).

Option #2:

- CRB Transit Committee would have significant policy, planning, budget and operations oversight that would be disproportional to the full CRB Board's responsibility;
 - Edmonton Transit (ETS) culture, practices and agreements transferred to CRB;
 - CRB becomes a large transit organization with responsibility for operations and labour relations;
 - Major disruption and transition for existing structures, management and labour.
3. What implementation challenges may the capital region face choosing one option or the other?
- For option #1 the biggest implementation challenge will be for the CRB to coordinate the various policy, planning and transit operations to deliver the region's growth management plan; and,
 - For option #2 the biggest implementation challenge will be taking on responsibility for the assets, debt, employees and collective agreements from ETS.
4. What have we missed?
- It is not clear where responsibility for planning, funding and operating of regional roads resides;
 - How funding will be determined between regional and municipal transit priorities (option #1); and,
 - Role of the Provincial government in the alternative governance models.
5. Does one model better suit the unique situation facing the capital region?
- No, Option #2 provides the best chance at successfully implementing the region's growth plan as the CRB would have full responsibility for planning, funding and operating all transit services in the region.
 - Option #1 provides a better model for operating transit services in the region as the Commission would be a single purpose transit organization focused on the business of planning and delivering transit at "arms length" to the CRB.
6. What suggestions do you have to improve the alternative we are considering?
- Combine the comprehensiveness and breadth of option #2 with the organizational model of option #1.

7. What do you see as the 1-3 factors that should guide the governance decision?

- Ability to plan, fund and deliver transit services in a way that best supports the CRB's growth management plan;
- Ability to secure stable, predictable and dedicated funding for transit; and,
- Ability to manage and operate a regional transit system that is efficient, fair and accountable to the interests of local governments, residents and transit customers.

8. What suggestions can you make regarding board composition for either governance option?

- Commission Board and CRB Transit Committee be comprised of elected municipal officials only;
- Terms should be longer than one year (ideally appointments for two or three years);
- Once appointed by a Council to the Commission or the CRB Transit Committee, the member cannot be removed by the Council (except for lack of attendance or resignation) for the appointed term;
- The Board should be comprised of only elected mayors or reeves so that it is well understood in the respective local jurisdictions that the mayor or reeve position is ultimately accountable for regional transit (an exception might be the City of Edmonton where due to population size multiple members might be necessary);
- All major cities, municipalities or counties with transit service should be represented (jurisdictions with small populations could be combined if the Board becomes too large);
- No substitutes or replacements for directors; and,,

- Fiduciary responsibility to the Commission or the CRB.
 - Any considerations or suggestion regarding voting structure?
 - Use population based voting only for major votes such as the strategic transit plan, increases in borrowing, annual budgets, tax increases and user fee changes;
 - Find a voting structure that would not pit the City of Edmonton against the rest;
 - Provide the City of Edmonton with multiple representatives to reflect its disproportionate size of the region's population; and,
 - Members appointed by the Province should be non-voting (if allowed in legislation).
 - Any considerations or suggestions regarding allocation of costs?
 - Try to avoid allocating costs to municipalities on the basis of the specific amount and type of service;
 - Develop a tiered system that reflects certain levels of service (e.g. urban, suburban, commuter, rural) and set municipal tax rates accordingly;
 - Ensure that transit services recover fixed percentages from user fees with a fare system that reflects the amount of service consumed (e.g. longer distance trips pay more than shorter distance trips); and,
 - Build up an operating reserve to allow for year-to-year fluctuations in revenues without going back for additional funding.
 - Any other considerations?
 - If the Commission model is adopted, ensure that the legislation establishing the Commission has sufficient protection to ensure that it's strategic and capital plans meet the CRB's growth management plan.
 - For example, this could be achieved by a requirement for the Commission to submit its strategic plan and any tax increases to the full CRB Board for ratification;
 - Also ensure that the legislation requires the transit agency to consult with cities, municipalities and counties, the province and other key stakeholders in the development of its plans and budgets.

9. What organization structures will be required to enable the alternative governance options?

Option #1:

- This will be a standalone transit organization headed by a CEO or Executive Director with a transit focus;
- The entity will need to staff for all functions that a transit entity would reasonably undertake;

- Management will need to be delegated responsibility to carry out the Commission's policies and plans;
- The Commission will need to be considered in law as a municipality for the purposes of receiving senior government funding, collecting local taxes, setting user fees, owning, procuring and disposing of assets, holding debt, borrowing, entering into contracts, leases and other agreements, expropriating property for its purposes, GST exemption etc.;
- The legislation should consider separating the policy, planning, public affairs and consultation, marketing, finance, asset procurement and construction responsibilities from the day-to-day responsibilities of operating and maintaining LRT and inter-municipal bus services;
- The Commission should have the powers to establish subsidiary companies and delegate to these companies certain powers and responsibilities (e.g. operations and maintenance) and to appoint the subsidiary Boards and officers; and,
- For purposes of the labour code, the Commission should not be the common or true employer of the employees of subsidiary companies, thus enabling the Commission to source other models for the delivery of some of its services.

Option #2:

- This will not be a standalone transit organization;
- The entity will be headed by a CEO or Executive Director who will have responsibilities for regional growth management, transit, affordable housing and any other responsibilities that the CRB undertakes;
- The CRB transit function may be able to share some responsibilities with other CRB departments (e.g. finance, capital projects etc);
- Management will need to be delegated responsibility to carry out the Transit Committee's policies and plans;
- The CRB will need to be considered in law as a municipality for the purposes of receiving senior government funding, collecting local taxes, setting user fees, owning, procuring and disposing of assets, holding debt, borrowing, entering into contracts, leases and other agreements, expropriating property for its purposes, GST exemption etc.;
- The legislation should consider separating the policy, planning, public affairs and consultation, marketing, finance, asset procurement and construction responsibilities from the day-to-day responsibilities of operating and maintaining LRT, inter-municipal and local bus services including services for the disabled;

- The CRB should have the powers to establish subsidiary companies and delegate to these companies certain powers and responsibilities and to appoint the Boards and officers of the subsidiary companies;
- For purposes of the labour code, the CRB should be not the common or true employer of the employees of subsidiary companies, thus enabling the CRB to use alternative models for delivering some of its services.

10. What insight can you provide into managing the transition?

- Find a clear political window;
- Mobilize advocates for the new organization including business, community and environmental leaders throughout the region with an interest in improved public transit and growth management;
- Work with the Province and the region's cities, municipalities and counties in the development of the legislation to create the new entity;
- Work with the Province to ensure that new funding sources come with the establishment of the new entity;
- Consult early with affected employees and the union(s);
- Where there will be a change in employer (e.g. from the City of Edmonton to the Commission or subsidiary company), ensure fair treatment to all affected employees so that the transfer will not alter the existing or legal rights of any affected employee regarding wages, benefits or seniority; and,
- Work with Federal and Provincial authorities to minimize or eliminate any taxes on the transfer of existing assets to the new entity.

11. Other Commentary?

On balance, I would suggest that an independent, standalone transit authority headed by a separate board from the CRB and established through the Regional Services Commission legislation is the best governance model given the nature and the scale of regional LRT and bus services. Legislation should ensure that the Commission's transit plans and operations are developed and delivered in a way that supports the region's growth management plan while allowing the necessary autonomy and attracting the specialized expertise necessary to efficiently implement and operate directly or indirectly regional transit services. Consideration should be given to expanding the mandate of the Commission to include joint responsibility with municipalities for planning, funding and maintaining a regional road network to an agreed upon regional standard. This would enable integrated decision making on the planning and funding of regional roads and transit services across the region.

As municipally owned and operated transit systems in the capital region are historic and serve no current strategic regional objectives, responsibility for all transit services including local bus and services for the disabled should be transferred to the new Commission. To ensure maximum flexibility in the delivery of transit service, the existing ETS should be transferred to a new subsidiary or subsidiaries established by the Commission that have a specified mandate to operate LRT service and local bus service primarily within the City of Edmonton's boundaries only. The Commission should also have the flexibility and be encouraged to contract for existing or new local and inter-municipal bus services that primarily operate outside or beyond the City of Edmonton's boundaries.

The Commission should have responsibility for the creating a “seamless system” with marketing of the transit system including branding, setting user fees (transit fares) and customer information.

Funding for regional transit services should tap available senior government funding first and look at multiple funding sources including gas tax, property tax, user fees (fares) and other potential sources.

B. Draft Land Use Policies and Objectives

The questions presented and a response to each is as follows:

1. Have we missed any major policy areas that can be addressed at the municipal or regional level?
 - In addition to supporting increased transit use, consider policies that encourage walking, cycling and shared rides ahead of single occupancy vehicle use;
 - Consider the introduction of policies that would focus and cluster more intensive employment, residential, commercial and institutional development to a number of sub-centres that are served by high quality LRT and Bus Rapid Transit services; and,
 - Consider the introduction of an urban containment boundary to reduce the outward growth in urban development.
2. What kind of more specific policies would support the effective implementation of inter-municipal transit?
 - Co-ordinating schedules and fares between local transit services and inter-municipal transit (not an issue if Governance model #2 selected);
 - Developing attractive transit service policies that would provide an appropriate quality of service to attract customers;
 - Ensuring attractive and convenient interchange facilities as part of mixed use town centre developments; and,
 - New funding source with monies pooled from across the region for high priority projects that support the region’s growth management plan.
3. Are you familiar with any jurisdictions that have implemented “best practices” policies?
 - Many jurisdictions have conducted best practice reviews and have borrowed or adapted policies.
4. What support should the region request from industry?
 - Support for adhering to the plan by developing denser, transit oriented development along major transit corridors and at sub-centres; and,
 - In lower density industrial areas, support for transit and other transport options including carpooling and vanpooling.

5. What support should the region request from the provincial and federal orders of government?

- Consultation on major transportation initiatives such as new highway developments; railways, airport expansion etc.;
- Locating federal and provincial employment centres such as offices and service centres, along existing intensive transit corridors (e.g. at LRT stations);
- Industrial development policies and plans that reflect the region's growth management plans and transit plans;
- New sources of funding for regional transit services that are stable, predictable and dedicated to transit and are within the control of the new transit entity;
- Flexibility to use the new sources of funding for servicing debt on capital assets or transit operations; and,
- Cost sharing on major investments such as a new LRT line or busway or HOV lane development.

C. Draft Table of Contents

- There is no mention in the table of contents about the draft land use policies and objectives and specifically how provision of transit services is an important implementation tool to support the desired land use objectives;
- The recommended governance framework should be more fully developed;
- A long range financial model including assumptions about debt, interest rates, inflation, etc should be developed that looks out a minimum of 10 years for projected operating and capital expenditures;
- A strategy for rapid transit (LRT) expansion including overall capital costs should be included;
- Not sure it is necessary to include data collection and GIS plans in the inter-municipal transit network section or in the report at this point in time; and,
- Transitional arrangements and actions should include specific about legislation requirements including the transfer of assets, debts, liabilities and contracts; financial and regulatory commitments; and, transfers of employees, collective agreements etc.

I trust these comments will be helpful for the Transit Committee, staff and consultants as it develops the inter-municipal transit plan. I look forward to our discussions tomorrow.

Yours truly,
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COMMENTS ON DOCUMENTS PROVIDED BY THE CAPITAL REGION BOARD IN ADVANCE OF THE JANUARY 23, 2009 MEETING

I concur with my colleagues on the Blue Ribbon Panel that the CRB and RTC are being well served with thoughtful documents, analyses and recommendations. The matter is very complicated and the process of properly defining and considering the options is daunting. But, I admire the resolve being shown in tackling the difficult questions. I hope that my few comments are recognized as coming from a person only vaguely familiar with local issues in the Edmonton region.

1. GOVERNANCE

Your suggested questions to address in advance of the meeting did not include questions on the Governance recommendations. I am nonetheless submitting comments for your consideration.

- 1.1 Governance recommendations is what should be a high degree of comfort about the roles of politicians, (provincial, regional and local) transit operators, the transit customers and the general public. The model recommended must be clear as to responsibilities, accountabilities and fiscal responsibilities.
- 1.2 Adopting an 'evolving' governance model to suit evolving roles for the CRB is appropriate but the governance model should include responsibilities for service planning and capital budget planning so that when operating and funding responsibilities are transferred to CRB from local municipalities, the CRB is not inheriting a mixed bag of plans and commitments that would be hard to govern and manage over time.
- 1.3 CRB need not contract with municipalities for existing local services, unless these are integral to the provision of inter-municipal services.
- 1.4 Above all, the percentage of inter-municipal trips will always be less than local trips and the governance model should reflect that in several ways.
- 1.5 I am not sure why the RTC needs to ensure the continued delivery of existing LRT. It is not likely to be abandoned by the City of Edmonton. I recognize that the LRT will provide key access points for inter-municipal transit but the facilitation of these transfers can be part of a fare integration scheme between CRB and ETS.
- 1.6 The RTC functions seem fine. Providing a single voice presentation of funding requests is ideal. Does that include being the voice of funding requests for local services as well?
- 1.7 The key issue of 'cost allocation' does not address how operating deficits will be allocated by the CRB. This should be discussed and resolved early.

- 1.8 As to the composition of the RTC, I think it is more usual for unelected municipal staff not to be 'members' even non-voting members but simply be available as advisors.
- 1.9 The quorum should only count voting members.
- 1.10 Unanimous support among the three current transit operators (I presume you mean the elected representatives for these 3 systems) may be a troublesome clause if an initiative does not involve one (or two) of the three and may not impact them financially or otherwise.

2. SERVICE POLICIES AND ROUTE PLANS

- 2.1 Overall the plan is thoughtful and is a good attempt at reflecting the Vision and Principles adopted earlier. It must be recognized that much of the development in the CRB territory is not transit friendly and designed to be served by automobiles. The large number of 'freeways' providing rapid travel throughout the region will make it very hard for transit to 'compete' with the automobile. Over time, as new and transit-friendly developments occur, the use of transit will become more accepted. The transition years will be difficult and decision makers may well be reluctant to invest in transit services when the actual demand will be low at the start.
- 2.2 In connection with my comments on the Specialized Transit (section 3), it is imperative all inter-municipal transit services as well as local transit services be provided by fully accessible vehicles. This will include lifts on 'highway type' coaches as mentioned in the plan. All of this is not only needed for 'equality and human rights' reasons but is necessary to transfer as many disabled persons as possible on conventional transit.
- 2.3 The word 'sustainable' is nowhere in the text. It is likely in the minds of the readers but mentioning it in the report would add a new dimension to the consideration of the options presented. Sustainable means that it can be sustained in the long run in terms of 'affordability by the users', 'affordability by those responsible for funding capital costs and operating deficits', as well as sustainable in terms of environmental impacts. Applying 'questions on sustainability' to proposed developments may well direct these proposals to more transit friendly street patterns and to higher density of residents and jobs per hectare.
- 2.4 Section 2.3 on page 8 refers to 'mass transit' for disabled persons. The term mass transit is typically avoided in English Canada as it implies that patrons- clients are masses and not individuals.
- 2.5 The principle for 'cost sharing' suggests that transit must be delivered 'fairly'. This may be interpreted as meaning 'equally' or equal levels of service irrespective of the demand. A better term might be 'based on demonstrated need'.
- 2.6 In terms of the LRT, it seems that it will be several years away before it extends beyond the Edmonton city limits. Therefore, there might not be a need for CRB to assume responsibility and contracting it back to Edmonton for a while yet. I agree that the CRB has a role to play in ensuring that LRT plans take on a 'regional context' and are not at odds with regional needs. This can be achieved without being responsible for the day to day operation, even if contracted back to the City. This way, the CRB does not need to have someone on staff to ensure that ETS runs it well and in accordance with the contract.

- 2.7 Addressing the downtown tunnel constraints should be a priority as it seems to affect most if not all LRT extension plans.
- 2.8 In planning services to the airport, the number of enplaned and deplaned passengers is not a useful indicator if it includes passengers who never leave the airport and simply transfer to another flight.
- 2.9 Under Potential Land Use Scenarios, page 20, under 'increasing Transportation Choices' there are 7 bullet points which seem to be in the reverse order of what they should. Sustainable transit services (first bullet) can only be successfully created if the actions in the other bullets have been followed. Simply reversing the order of the bullets might convey the point better.
- 2.10 Reducing existing urban sprawls will not be easy and this is where 'in fill developments' of higher densities can help generate transit ridership. This applies to both residential and commercial.
- 2.11 The transit ridership growth noted in Table 5 will very much depend on transit travel times as it will be hard to compete with automobile travel times which are greatly facilitated by an extensive freeway network.
- 2.12 Assuming that a population of 15,000 can be a threshold to justify a transit service might only work if the community is relatively compact.
- 2.13 Section 6.2 notes several options for regional for transit buses from outside of Edmonton to travel directly to the city centre. This is desirable but may have negative impact on revenues for ETS.

3. SPECIALIZED TRANSIT

The provision of specialized transit services is, as noted, a very complex issue. I chaired an Ontario Committee that developed Accessibility Standards for all public transportation services in Ontario. This was a 2.5 year process and the recommendations are now being turned into regulations. The fundamental right of a disabled person is to equal and equitable transit service to that offered to non disabled citizens. There is no point in fighting that as you will end up being forced to do it any way. This means:

- All inter-municipal transit services will need fully accessible buses – either low floor or lifts. Low floor are the best approach for faster loadings.
- All disabled persons that cannot ride a fully accessible conventional service must be provided with parallel services for the same hours of the day and for the same fare. This applies clearly in local transit services. In the case of inter-municipal, this is not the case in the Toronto Region as yet, where I am familiar with the services. Inter-municipal transit via specialized transit vehicles is done by transfer from one operator to the other at the municipal boundary or reasonable nearby spot. This is regarded as non compliant with the proposed regulations because able passengers get transfer-free inter municipal transit. The Metrolinx (regional transit agency for Toronto) is now looking at how to improve inter-municipal travel for disabled persons that cannot use regular accessible transit.
- Many specialized transit trips are for medical reasons such as dialysis and these are needed trips.
- It is generally accepted that trips on specialized transit cannot be prioritized (i.e. medical over recreational) as they are not prioritized on conventional transit. An equality issue.

Specific comments on the report

- 3.1 The wide variety of local services for disabled persons is important to acknowledge and understand carefully as new service policies could well result in a degradation of services for some.
- 3.2 Some now allow seniors to use specialized transit. This is not common practice as seniors, even older seniors, are not necessarily disabled. This practice probably exists where there is no conventional services.
- 3.3 The Dial A Ride service in Devon is not a specialized service for disabled persons as it is open to all. It is simply another form of conventional transit service delivery.
- 3.4 I don't think CRB needs to rush in providing inter-municipal transit services for disabled persons unable to ride accessible conventional transit. You can first study the possibility of inter-service transfer between specialized transit services.
- 3.5 Providing for inter-municipal specialized transit could result in trips from say St. Albert to Leduc. The practical way to satisfy such demand would be to deliver the rider to a south end LRT stop and he/she would ride the LRT to the nearest station to St Albert and then transfer to a specialized vehicle. This is indeed the service delivery strategy being implemented by the Toronto Transit Commission to avoid specialized transit trips of 30 or more km long.
- 3.6 Disabled residents in rural areas not served by conventional transit typically do not get specialized transit funded by transit agencies either. They sometime get some services through other arrangements. Assuming this demand as a 'transit demand' has long term financial implications for transit.
- 3.7 CRB can first get involved in providing information for existing inter-municipal travel options before assuming responsibility for providing and funding inter-municipal specialized transit.
- 3.8 Also work towards common eligibility criteria.
- 3.9 The transitional arrangements in Section 3 appear reasonable.
- 3.10 Fixed route specialized transit as envisaged in section 4.0 is unlikely to work as by nature, these services have to be door to door and cannot adhere to normal schedules. I have not heard of such services elsewhere.

4. TRANSITION PLAN

- 4.1 The transition plan proposals are generally good.
- 4.2 Unless the CRB has some implementation responsibilities for land use through the Regional Growth Plan, it will have a very difficult time in developing, operating and sustaining reasonable transit services. Therefore, securing correct legislation and regulations will be critical.
- 4.3 The steps for the formation of the RTC in 7.3 should include a section on defining the role of the Committee.
- 4.4 Developing a Business Plan under section 7.4 should also include a funding plan and a clear understanding of who assumes the operating deficits.
- 4.5 The concept of 'quick wins' is wise.
- 4.6 The gradual assumption of responsibilities by CRB will affect the level of staffing needed and the skills needed.

5. FIVE YEAR COSTING

- 5.1 This section does not address how the operating deficits will be allocated. I think this is critical to include.
- 5.2 A cost recovery of 37 percent is low by Canadian standards but may be necessary at the outset. This is where appropriate land use policies can increase this recovery level.
- 5.3 Experts in international energy issues claim that the current economic downturn has reduced fuel demands by roughly 5 percent which has resulted in a huge decrease in the price of fuel. The same experts say that increasing auto sales in India, China and Latin America will require an additional 17 to 20 percent more fuel in the very near future. Given that the ability of the globe to supply more than current levels is very much in doubt, imagine what a 17% increase in demand will do to the price. It may well push it to the point where your assumptions for diesel fuel costs are unrealistic. Therefore, give serious consideration to hybrid and trolley buses on main local service corridors with so as to minimize your use of fossil fuel by transit. Even when the electricity is generated by coal, the GHG benefits are still on the plus side for electric drive due to the high efficiencies of electric motors. And, the cost of electricity is controlled within Alberta and not subject to international market volatilities.

INITIAL FEEDBACK ON EDMONTON CAPITAL REGION BOARD'S PUBLIC TRANSIT PLANNING

by

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The transit planning documents that were circulated to the 'Blue Ribbon Panel' reflect considerable effort and analysis on the part of the CRB and its consultants. The draft service policy and route plan does a very good job of setting forth transit options for a future that is anticipated to extend today's economic, social and environmental trends. The plan also raises the possibility of an 'Alternate Scenario' in population, employment and regional development that could yield more effective transit services. This Alternate Scenario is an important step in the right direction, but I would encourage the CRB to pay much greater attention to examining future scenarios in which energy, environmental and economic factors differ substantially from those that have driven Edmonton's growth over the past ten to fifteen years, and which have set the stage for the Capital Region Board's planning initiative.

While the future is more uncertain today than at any point in living memory, I am confident in predicting that it will differ markedly from the present – in that we will experience a transportation and urban development paradigm shift during the next decade. Thus, the actions that are most likely to be overtaken by events are the ones based on past trends and patterns. In my view, the Draft Service and Policy Plan as it is currently developed has a good chance of being obsolete before the first capital projects it anticipates are completed. This reality applies to almost all plans for public and private sector organizations dealing with transportation and urban development. The key question is what to do about such a situation.

My advice is to present the current plan as a starting point for the CRB's Transit Committee, but to explicitly recognize that the economic, energy and environmental assumptions of 'business as usual' that lie behind it are likely (>50% probability) to change dramatically during the coming five years. It would then be worth identifying the tipping points that would require changing planning and investment priorities, or at least identifying an analytical process and time frame that would assess these dynamics.

Some questions that deserve attention to get a better handle on these ‘tipping points’ include:

- At what point does the turn away from internal combustion engines as the primary means of automotive propulsion call for a redesign of road infrastructure, and a reassessment of travel demands by automobile?
- How will the future price of energy (including price influences of environmental taxes and caps on carbon) change the approach to development in and around Edmonton?
- How long will governments be able to continue current funding arrangements for road building and maintenance in an era of energy and environmental change? What alternatives might emerge, such as electronic road pricing, to cover public expenses that were once funded directly from the treasury?

These questions are not meant to be exhaustive, nor are they the definitive formulation of enquiry into the future relationship between autos, auto-dependent land use and public financing of local transportation. But without questions such as these being explored, Edmonton’s future transportation development will be very likely to encounter some unhappy surprises.

The lack of a plan that one can have confidence in should not be a reason for delaying the governing and organizational arrangements to launch a CRB Public Transit Committee. One of the committee’s first priorities, however, needs to be a strategic adjustment plan that can assess and develop alternative paths from the proposed draft plan that take account of energy, environmental and economic change drivers.

In my view, the best practices that deserve greater attention for managing such an uncertain future can be found in two distinct areas. The first is in the emerging domain of ‘transit oriented development’ which can be found across various jurisdictions. The New Transit Town by Dittmar and Ohland offers an excellent overview of these practices. A new book that has captured the relationship between transit, land use and energy and climate challenges is Resilient Cities by Newman, Beatley and Boyer. I recommended The New Transit Town in my previous comments and still think that its ideas and examples could improve the CRB’s future plans.

The draft service plan still needs to embrace a strategy for transit oriented development that will replace the park and ride infrastructure proposed for future LRT stations. Park and ride has been a suboptimal solution for existing rail transit operations, from BART in San Francisco to the Toronto Transit Commission. If climate and energy drivers change the nature and use of the automobile within the coming decade, transit stations designed around park and ride will become even less functional. Park and ride is an obsolete transit and urban development strategy that needs to be rethought.

The second area of best practice that needs greater attention in the next iteration of the CRB's transit planning is the successful use of intelligent road pricing in Europe, and even along Ontario's Highway 407. Edmonton should consider becoming the first Canadian jurisdiction to move beyond 'road socialism', by which I mean embracing the efficiency of the market as a mechanism for allocating urban road space rather than continuing the suboptimal, and immensely wasteful, approach of 'first come first served' traffic congestion during peak hours. London and Oslo offer two examples of best practice in intelligent road pricing. Oslo may be more comparable to Edmonton in size and climate, but in both cases congestion dropped and public transit use grew.

Road charges offer the most likely revenue stream to fund some of the transit expansion envisioned in Edmonton's service plan, given Alberta's looming budget constraints in an era of energy sector retrenchment. It is unrealistic to imagine that provincial funds will be made available from the general treasury in the quantities needed to expand Edmonton's transit system along the lines considered in the transit service plan's medium and long term.

The draft service plan has provides an important first step toward the CRB's vision of making public transit a 'convenient and competitive' mode of transportation in Alberta's capital region. Much work will needed to realize this vision, including a serious engagement of the economic, energy and environmental drivers that will dramatically change the ways in which urban development unfolds during the coming decade. The governing and administrative arrangements that have been proposed for the Regional Transit Committee could serve this transition well, if they are matched by imaginative planning and courageous leadership that anticipates significant changes from established land use and mobility arrangements. These are on the horizon and dealing with them sooner, rather than later, will enable Edmonton to maximize its future prospects.

Capital Region Public Transit Committee
 Blue Ribbon Panel Evaluation Highlights
 Robert Olivier (January 21, 2009)

GOVERNANCE STRUCTURE

The recommendation for the governance structure is a good one but I still insist that some point must be checked out before the final recommendation:

- CRB should define inter municipal service before contracting any service.
- It is very important to define the transition mode if the CRB is going to have more responsibilities in the future. What will be the compensation and how will it be financed.
- Quick wins are very important, the 20/80 rule must be the approach. The capital plans must be for 10 years to start and be redone every year to make things clear for the partners. I would suggest a priority evaluation system to make the choices with any doubts.
- I think that you should find a way to make everybody involved for certain subject like it is in Vancouver.
- Some overall questions to be address:
 - 1 Park and ride facilities free?
 - 2 Fares will be a zone system?
 - 3 Branding: I will provide a study by Patrick Vautier of RATP who presented it at the last International Union of Public Transit conference.
 - 4 Specialized disabled trip dispatching exist don't re-invent the world
 - 5 Why at the RTC voting do you need unanimous support among the 3 current transit operators?

Finally what will be the role of CRB in the planning of inter municipal roads development, construction and modernisation?

SERVICE POLICIES AND ROUTE PLAN

In the vision statement it is said: "A well planned regional transit network that is well integrated with land development and land use provides a strong foundation for growth management and the achievement of the region's economic, social and environmental goals." I completely agree with that statement but my questions regarding that aspect are:

- What is the proposed relationship between CRB and the cities and the Capital Region?
- Is there an mediation board? etc

The same questions apply for the planning principles concerning roadway. How will you manage one inter municipal road coming into a local road? On the light rail development I think that the questioning for the future of the network is well address. Looking at the figures that are related to the development of downtown Edmonton make the reflex ions wide open to my mind. I think that the reflex ion should be an integrated one for the overall region with the social and economic development in mind. Is light rail transit always the solution? Can BRT be done as first move before LRT?

Concerning the tunnels constraints it should be addressed right now in the capital plan especially with all the money available from government and the willingness of the population to encourage public transit and build for the future. These type of investments are always a key for future development even if they are not fully used at the opening date.

The long distance hi speed rail are always in balance with urban sprawl and low density. The solution of building TOD is one of the aspects that has to been look at right from the start. New transit facilities may come before urbanisation in some area and are the occasion for town planner to develop new cities and sometimes redevelop old section around the stations. In Montreal, many examples have been realised over the years with great success. The new way of looking at these developments is presently to have parking lots integrated to building surrounding stations instead of building large parking lots that are used part time.

If the extension of LRT to St Albert and Sherwood Park is to reduce the role and the fleet size of the 2 municipal transit operators, the strategy of implementation of LRT should be immediately define: revenues sharing, local or inter municipal feeder, bus service of LRT like GO in Toronto, extension of ETS responsibilities to these territories, etc .Before finalising the LRT extensions, planner must look at existing facilities before building new ones.

The transit service development seen alright but you must not forget that reverse commuting is something that is growing in our new town development and it should be looked at specifically for the resident of center Edmonton going to exurban. On the potential land used scenarios, I think that the new economic situation must be looked very closely. Are the planned investments will be done at the same speed? Are the new constructions will be stopped for a while? What will be the economic growth for years to come compare with the trend scenario?

Another thing I would look closely is the projected Leduc development to make sure that it can become a model city for the integration of transportation and urban development. Will the economic situation stop that development?

The inter municipal transit service plan looks quite related with the economic project development. I think that all the transit priorities measures should be installed rapidly and included car pooling. Public transportation should take the place immediately.

On the vehicles fleet aspects, I think that every bus should be accessible to disabled people. The operation of a bus fleet is always hard to manage when they are different models of vehicles. All new inter municipal buses should have Wi-Fi, air condition, etc to be consider as an alternative to private car.

CRB must be the owner and act as a leader implementing the smart car system. CRB must be the chamber of commerce when regional fares are used by customers. My preference for that type of system is the to implement the same system we just implement in Montreal over the last 6 months for all the 14 operating systems and the city of Québec who is located at 250 km from the control center. You should have in mind an integrated fare system with a zone definition. That approach is a winning one for the customers and has been test for over 10 years in the large Montreal region. That approach is also largely implemented in Europe.

SPECIALIZED TRANSIT PROVISIONS AND ACTION PLAN

Specialized transit is always a major consideration in every agglomeration. The 1% inter municipal trips for 2008 seems low. I think that the small numbers is directly link to the lack of availability. The numbers with the new system should go around 5% very rapidly. The cost of the future trips must be link with the zone approach as regular transit and must be subsidized in part by CRB. The same fare structure must be applied to that category of customers

Another important thing to have and efficient specialized transit is to fix a universal definition to determine who is eligible. Questions like, what type of mobility do the customer have? Or how many meters can he walk? etc. For those who will not be considered qualify, others transportation mode should be keep like volunteer driver program.

Considering that your principles and guide lines are fine for the service you want to offer, my position will be that every operating agencies are responsible for local trips and are offering regional trips with a refund for those trips by CRB on a define yearly budget allocation per operators. That allocation will vary on a yearly basis depending on the demand from the year before.

CRB must not be responsible for any day to day task including choosing who is eligible or not. CRB may provide the framework but the decision is locally administrated locally considering the proportion of local trips.

TRANSITION PLAN

The transition plan must be accompanied with a wish list calendar to prove to the partners that is what people and elected want. Starting the operation of CRB in January 2010 seems to me a good target.

If everyone agrees with that target date, this will force the legislator to approve the structure before the summer. Then it would be easy to prepare the budget for 2010. Another solution will be CRB in operation in 2010 for the implementation and in full force responsibilities in 2011. The first priority of CRB board will be to find rapidly a lead executive who knows transportation and who is very good at making business consensus with operating partners'. I think that developing a preliminary Business plan must start following that exercise to have something in hands pretty fast when the legislation approved the principle of CRB. That job can be done by a consultant, the technical committee or by the same structure governing the blue ribbon panel. Depending on some choices it is important to fix right now the transition rules for the future

OPERATING AND CAPITAL COSTS

In the Quick Wins I would have all the transit priorities measures on the move to start. The estimated 5 years operating costs-100\$ per hour-seem rather low. What are the cost of maintenance of a double decker or articulated buses compare to a regular bus? What about the cost of inventory for the new buses models?

On the average cost recovery, 37% seems very low in comparison with other network. In Montreal, where the average recovery was 48% in 2007, the long term objective is 50%. Concerning the fare, I will recommend a study that will help to prepare the arrival of a smart card. New fare structure, new types of tickets, % of fraud, etc.

For the park and ride space I would recommend that to start it will be free and introduce payments with the arrival of the smart card.

The cost of your new buses seems low at 640000\$ if I compare with the last tender I saw. On the other end I think your garage cost is high. Concerning double decker don't forget to check the height of the existing facilities.

At 8.2.2 light rail transit capital costs must included the tunnels additional tracks.

To conclude I think you should have cost beyond 2013 to match your long term projection for other purpose.

To: Capital Region Board Public Transit Committee
 From: Glen Leicester, Member of Blue Ribbon Panel
 Date: January 23, 2009
 Subject: "Blue Ribbon Panel Review" Comments

The following represents a high level review of the Capital Region Board's report on Service Policy and Route Plan, Specialized Transit Review and Action Plan, Transition Plan and 5-Year Operating and Capital Cost Projections. I have organized each section to respond first to the questions provided by the Project Manager, and secondly to provide for broader commentary.

A. Service Policy and Route Plan

The questions presented and a response to each is as follows:

1. Are the proposed Service Policies reflective of the Vision and Principles?
 - The service policies generally reflect the vision and principles (supportive of the region's growth strategy including concentrating growth in corridors and nodes and matching transit supply with the different land uses in the region).
 - Having said this, the future land use assumptions and transit plan even under the Alternate Scenario is very much "business as usual". I have made commentary on this under 8.
2. Do these Service Policies respond well to the current situation, opportunities and challenges?
 - The policies provide direction in terms of service priorities for regional bus and LRT services over the next five years.
 - They also make a good case for re-examining Edmonton's long-term plans for LRT expansion.
3. Are there any weaknesses or omissions in the Policy framework? How might we improve/address the gap? Any best practices we should review?
 - There is no mention of focusing higher density development along the major transit corridors and nodes including at LRT stations and intermodal hubs. These are prime locations for transit oriented development that must be tapped if the CRB is to achieve the region's growth management plan.
 - At the same time, there is an overreliance on park and ride, which fosters automobile use and sprawl and takes away from potential transit oriented development at stations. Metro Vancouver has 33 rapid transit stations but only one has park and ride (charge \$2.00 per day).
 - The policy framework is very focused on transit supply but makes no mention of managing transportation demand. There is no reference to complementary policies that might constrain the automobile such as limiting parking supply, charges for parking, higher gasoline taxes, vehicle levy's, tolling, congestion pricing etc. Without some constraints on the automobile, it is difficult to see how regional transit will achieve the vision that has been set out for it.

- There is virtually no mention of the Province in the policy framework. The Province plays a key role in a number of activities that are critical if the CRB is to achieve its vision including funding and legislation, construction and maintenance of provincial highways, location of government offices and other facilities, industrial, housing and agricultural policy, crown lands etc. The Province should be considered a partner in preparing and implementing the regional plan.
- It is unclear what the policy framework is with respect to regional transit fares. While there is mention of integrated and seamless systems under the vision and principles, section 7.0 on the regional fare system provides an overview of the existing (and somewhat depressing) situation today of a patchwork quilt of policies, structures and technology, yet there does not seem to be a policy statement of where this will go. The framework should be clear on what the region's policy is.
- Overall there is very little on how services and facilities are to be funded and supported. Transit operating and capital costs are substantial and without clear funding it is difficult to see how these proposals will be implemented.

4. What comments do you have on the Route Planning work? Methodology and Assumptions? Proposed Route Map and Evolution?

- The route plan seems to be driven by a digestible staging plan for LRT expansion and the resultant truncation of regional bus services. Facilities such as intermodal hubs and park and rides are an outgrowth of this staging plan.
- It is not clear how the LRT staging priorities have been established or indeed if they are affordable. It is also not apparent how the staging plans support the CRB's growth management plan. Are these plans intended to shape future land use? If they are there, corridors should have strong ridership potential and significant development potential. There should be a strong commitment on the part of municipalities to ensure that areas around the stations are zoned for higher density development.
- There does not appear to be a second tier of higher quality transit services such as rapid bus services, trolleybuses or streetcars that link up some of the major destinations not served by LRT. These could provide a finer grid particularly in the urban core and Suburban Zone, which should be prime areas for higher density.
- The route plan does not specify overall what levels of service (e.g. frequency and hours of operation) are contemplated for the key regional bus services. For example, it seems that prime bus corridors that are intended to foster intensive transit development in the Suburban Zone should be provided levels of service that allow for spontaneous trip making, similar to the urban core. The threshold for this is typically a minimum of a bus every 15 minutes for say 15 hours a day, 7 days per week.
- Overall the map could be improved considerably by improving the scale, identifying key nodes and development areas, corridors and the major regional transit lines and hubs.

5. Recognizing the predominance of suburban to downtown usage, how do we balance issues of local customization and decision making (i.e.: service design, standards, fare collection, branding) with regional consistency?

- It is very difficult to separate regional from local services and preserve the flexibility in service design to provide what is best for the customer. Given that the intended governance system maintains local transit authority autonomy, regional policies will best be directed at identifying service standards to be met (e.g. minimum frequency, travel time, hours of operation, loading etc). Under such a system the local providers would have responsibility for the service design ensuring key regional criteria are met on the primary routes.
- The CRB should be striving for an integrated fare structure and collection system across the region. This should include both regional and local services. Fares should vary by the amount of service consumed, not by the municipality the transit service operates in. All transit services in the region should have the same fare collection technology to allow for common media whether it is smart cards, magnetic or other. The fare media can provide a regional transit unifier or brand across the various municipal operators.
- Given the intended governance arrangement, the region should adopt a simple brand identity that appears on vehicles, facilities, signage, communications and promotions material. This would be an addition to the primary local branding.

6. How can we also identify, promote and effectively develop other inter-municipal routes (suburb-to-suburb)?

- Identify key activity centres and nodes from existing and future land use plans and assess the adequacy of the existing transit connections in terms of travel times, frequency, numbers of transfers, hours of operation etc. Rank the potential links and identify options for improvement.
- Based on work by the consultants an east-west line that connects West Edmonton Mall with the University and Strathcona might be worthy of investment.

7. Considering our intended governance structure, do you foresee any challenges in implementing this Service Plan?

- Reaching and maintaining agreements with municipalities on the priorities for regional transit investment to support the growth management plan.
- Securing the necessary funding to implement the plan given the uncertainty around stable and predictable funding.
- Complex interagency agreements with municipal transit authorities to plan and deliver the regional services in accordance with the standards set out by the CRB.
- Short term land use decisions by municipalities that do not support the region's growth plan.

8. Other Commentary?

While the region's growth management plan recognizes the need for change, the Alternate Scenario put forward in the plan still sees higher rates of growth in employment and population occurring outside the City of Edmonton than in the City itself. At the same time there is an acceptance that the ring roads including a new outer ring road will proceed. If these happen, the outward spread of the region will continue.

The challenge as I see it is how to add 600,000 plus new residents in the future, but doing it in a way that does not replicate the sprawl of the last 50 years. Today the Edmonton CMA has the lowest transit usage of any major Canadian urban region. It also is has the lowest population density. If these are to change, then the land use patterns will also need to change. Given the size of the existing urban footprint, the CRB should look at more aggressive land use intensification that can be well served by existing and future public transit investments. The outer ring road could be shelved or if it must proceed, consider tolls.

B. Specialized Transit Plan – Provisions and Action Plan

The questions presented and a response to each is as follows:

1. Have we considered all the relevant issues of delivering/ expanding Specialized Transit services?

- The amount of trips taken on systems today is likely constrained by the availability of service. There would be even higher use if more funding were available.
- With an aging population, the demand for specialized transit is expected to grow rapidly over the next 30 years. Based on work in Metro Vancouver, this could triple over the time period.
- Specialized Transit is an expensive business to be in. Today the cost per trip is \$23 and 99% of these trips start and finish in the same municipality. Intermunicipal service will have longer trips and be less efficient in the use of vehicles – costs per trip will be even higher.
- Every effort should be made to shift persons to conventional transit. This frees up more space on the specialized service for those that absolutely need it, improves travel choices for users and reduces cost to the agencies.
- Local transit authorities can help by providing much better information and other travel assistance to encourage the use of conventional services.
- Lack of accessible municipal street infrastructure and bus stops is a big deterrent. In addition, Edmonton's climate makes using conventional transit more challenging in winter time.

2. Does our plan of action for addressing delivery and expansion of Specialized Transit services intermunicipally make sense? Does the evolutionary process (info, dissemination to trip management) make sense? Any insights into standardization of eligibility criteria, trip purpose and service level? Any suggestion on how to address questions of comparable service” to general transit?

- This seems to be a reasonable approach to the providing for the limited number of intermunicipal trips.
- Efforts however, should be taken to shift more people to conventional transit. This needs to be done at two points – when people first register for the service and secondly when they reserve trips. For the mobility manager function to be successful, conventional and custom transit must be more integrated with the region and municipalities.
- Efforts to standardize eligibility, trip purpose, service levels and fares should also be a priority. In the future, it will not really acceptable to have such a patchwork quilt. In Metro Vancouver, different service levels continue to be an issue, even though TransLink is the sole transit provider in the region.
- In terms of comparator service, hours of operation should be roughly similar to the conventional transit hours in a community. If demand is low in the evenings and weekends, taxi supplements can provide a lower cost service delivery option.

3. What advice can you provide on the complexity of this service?

- The existing situation is very complex.
- Moving to a more standardized approach to the front end activities will assist.
- The reference to replicating the Vancouver model in section 2.3 may be a little misleading as TransLink is responsible for both local and intermunicipal transit services.

4. Considering our intended governance structure, do you foresee any challenges in implementing the provisions for Specialized Transit?

- Complex interagency agreements with municipal transit authorities to deliver the intermunicipal services.

5. Other Commentary

There are currently eight municipalities providing specialized transit services or programs for the elderly and disabled in the Edmonton region. Each provides its own funding, oversight, eligibility, registration, scheduling and service delivery functions either directly and indirectly. Each charge different fares and there is no standardization of in terms of the level of service. The functions cost \$23 million per year and cost \$23 per trip.

It seems reasonable that there should be some economies of scale in administration and efficiencies in service delivery if there were consolidation(s). Given the projected spike in demand that will come from an aging population, more attention to costs should be a priority.

C. Transition Plan

1. Do the major transitional phases and relative priority/ order of these activities make sense?
 - They seem reasonable
2. What do you see as the top three factors (barriers or enablers) that will lead to success in implementing our intermunicipal Transit Plan?
 - Reaching and maintaining agreements with municipalities on the priorities for regional transit investment.
 - Securing the necessary funding to implement the plan given the uncertainty around funding.
 - Cooperation and agreements with municipal transit authorities to plan and deliver the regional services in accordance with the standards set out by the CRB.
3. Have we missed anything?
 - A funding source. Without some ability to fund these services, the CRB will be reliant on others to make it happen.
4. What would you see as the key “quick wins” from the perspectives of (i) federal and (ii) provincial governments as well as (iii) the transit system users and (iv) the community at-large?
 - For the federal and provincial governments, reductions in GHG emissions as a result of investment in new transit vehicles and services.
 - For transit system users, a single integrated regional fare system.
 - For the community at-large – that the RTC offers value.
5. Considering our intended governance structure, do you foresee any challenges in implementing our Transition Plan?
 - Cooperation, agreement and support of the member municipalities and local transit authorities
6. What if any advice can you provide related to the kind of staff resources that will be required to support implementation of this plan?
 - Initially you may wish to approach the local transit authorities to request secondment of staff to assist in developing some of the quick wins. This could increase buy-in and build relationships.
 - When hiring a Manager, you will need someone with a strong background in reaching out to others, negotiating agreements, knowledge of local and provincial governments and ideally some transport planning/ operations experience.
7. What pitfalls do we need to avoid in order to be successful in implementing a regional transit network?
 - Given that the region has very little power (e.g. funding, mandate, operational policy), it will need to build constructive relationships based on mutual interest with the Province, municipalities and their local transit authorities. This will be required at both the political and administrative levels.

8. Other Commentary?

When advocating for new funding mechanisms for intermunicipal transit, I think the CRB is better to work with the member municipalities and perhaps Calgary to put forward new ideas to the Province for transit capital and operating funding in the two metropolitan areas. Such an approach might give the region more leverage if Provincial (and federal) funding flowed through it and then it could pass to the municipal authorities.

D. 5-Year Costing

1. Does our costing reflect all the major elements? Have we missed anything?

- A minimum 10-year horizon should be used given the magnitude of expenditures.
- Should include CRB transit administration, marketing and other overhead costs.
- It is not clear what inflation rate is assumed for labour, fuel and other expenditures.
- It is not clear what the interest rate is for short term and long term borrowing.
- There is no mention of debt as a result of borrowing to finance capital projects?
- Assumptions around 37% cost recovery – how was this determined and what options were considered?
- Include some ramping up of ridership and revenues to meet the 37% target.
- All bus services are costed at the same rate – specialized transit services should be lower.

2. Do you have any suggestions on how to better reflect these costs?

- Should develop a table which shows year by year build up of operating and capital cost projections commensurate with the proposed service expansion plan starting from a base year.
- In the table show revenue requirements year by year reflecting the service expansion plan – include projections for operating revenues (fares, advertising, other) and assumptions with respect to proposed fare increases.

3. How can we position these cost estimates in a manner that achieves awareness and interest of provincial and federal officials?

- Should highlight projected revenues including operating revenues from users as well as required revenues required from other sources (local and senior governments).
- Include as part of the financial cost estimates, a simple scorecard that highlights the financial, transportation, environmental and social/ community impacts of the investments being proposed. The potential could include reduced greenhouse gas emissions, potential reductions in highway traffic volumes etc.

4. Are there any proven “factors” or “Multipliers” that help estimate the operation costs associated with a level of public transit investment in capital?

- This will vary depending on the nature of the investment. For example, an average bus is in service 2,500 hours a year – at \$100 per hour this would amount to \$250,000 in operating costs for each new bus.
- I would however, suggest that order of magnitude operating costs for each capital investment be prepared and included in the funding model as opposed to using multipliers.
- With the availability of senior government funding for capital projects, the biggest issue that faces transit authorities is the operating cost (beware do not accept an elephant without its feed).

5. If you had limited funds to support the regional transit initiative ... how would you spend them to get the maximum benefit for the customers?

- Establish a fully integrated fare system that charges the same across the region for local and inter-municipal services.

6. Other Commentary

A long range financial and scorecard model (minimum 10 years) should be developed as a policy-shaping and management tool. The model should provide the CRB Transit Committee financial and performance projections for the time period. It should be capable of generating projections for a base case, facilitating scenario analysis and providing a basis to set near term capital and operating budgets as well as projecting operating revenues including shortfalls. The model should be able to test various assumptions as well as do sensitivity analyses. In addition, it should produce a scorecard where the results can be quantified to show benefits of the investments.

While capital costs for new fleet and facilities are substantial, there is potential for cost sharing from the provincial and federal governments to reduce some of the burden on local municipalities. On the other hand, operating costs are substantial and continue to grow year by year. Transit authorities should try to ensure that they recover as much from the users as possible. I would suggest a review of the 37% cost recovery and see if a higher amount can be achieved (say minimum 50%).

I trust these comments will be helpful for the CRB Transit Committee, staff and consultants as it develops the inter-municipal transit plan. I look forward to our discussions on Friday.

Yours truly,
Glen Leicester

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